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THE RISE AND RISE OF IN-PLAY

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Assessing opportunities in the re-regulated market

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2019 ISSUE 1

INTERGAMINGi

CONTENTS // THIS ISSUE...

#OPERATOR

- 07 News: Offer for Cherry; Fantini index
- 11 Casino City latest stats

#SPORTS

- 13 News: William Hill green light over MRG; Sportradar on tennis integrity
- 16 In-play: What the future holds

#REGULATORY

- 19 News: UK whistle to whistle ban; MGA sandbox framework
- 20 Sweden in focus: Entering the re-regulated market
- 23 Digital Isle of Man looks at ICE London
- 25 Processing.com talks Brexit



#CASINO

- 27 News: Greentube partnership; Wazdan's TGP Asia partnership
- 29 Products: Stakelogic's Book of Cleopatra; Blueprint unleashes Mars Attacks!



#SOFTWARE & TECHNOLOGY

- 39 Slots: Examining current and future trends
- 50 Payments: Enhancing the customer experience
- 53 Sports: US opportunities and potential CSR drives
- 57 Lottery: Untapped potential



MATT CHAMBERS - EDITOR

GENIUS EDITION

ICE London, as it is now known, will again crackle with energy across its three days and – as is now customary – promises to be the biggest event yet.

These days, it's fully expected by attendees that the array of stands spread across the vast ExCeL London will feature spectacular design elements (though perhaps, following the well-publicised furore that saw flames fanned by the wider media, the more outrageous attention-grabbers may tone down their efforts a notch).

On that front, it's a foregone conclusion that the bigger boys in the playground will not disappoint in flexing their muscles.

But the theme of this year's event is "Spirit of Genius" and it's clear that even within smaller operations and start-ups, the igaming world contains such a hugely impressive level of innovating talent.

In this issue of *INTERGAMINGi*, we speak to industry players about the avenues of creativity they expect to open up in the coming year, across various verticals, while also examining the development of what has quickly become massive news in sports betting – the world of in-play betting.

The *INTERGAMINGi* team will be on the show floor at ICE London as usual, processing the sights, sounds and ideas across the 72 crucial hours and thereafter, the London Affiliate Conference that follows it.

As is also customary, we will once again be producing the *ICE Daily* editions to provide an up-to-date chronicle for everyone in attendance. We will see you there.

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HEADLINES

SWEDISH gaming group Cherry has received a takeover offer of SEK9.193bn (£802m) from a consortium fronted by Bridgepoint, a British private equity firm.

An independent bid committee set up by Cherry has recommended that its shareholders accept the offer, which amounts to SEK87 per share.

The bid was submitted by EE Intressenter, a company jointly controlled by a consortium consisting of Bridgepoint Advisors, acting as managers for limited partnerships comprising Bridgepoint, Prunus Avium, Klein Group, Audere Est Facere, Pontus Lindwall, Berkay Reyhan and Can Yilanlioglu.

The acceptance period for the offer is expected to expire around January 23, 2019, subject to extensions. The bid is conditional on the consortium receiving at least 90 per cent of Cherry's shares.

Morten Klein, who is part of the consortium, is chairman of Cherry's board and given that fact, an independent committee was set up two months ago to handle questions relating to the consortium and the offer.

Mika Herold, partner at Bridgepoint Advisers, said in a press release on behalf of the consortium: "We have followed Cherry closely for a long time and have the highest regard for the success and impressive track record that Cherry and its divisional management teams have achieved through driving innovation in the gaming sector.

"However, we also believe that many of the opportunities and challenges facing Cherry and its subsidiaries are easier to approach in a private setting and with a more favourable capital structure.

"The changing regulatory environment together with necessary measures to defend and increase Cherry's market share over time, will require significant investment. We have presented a financially attractive offer for the shareholders, which is reaffirmed by the support received from some of Cherry's largest shareholders. We are confident that the consortium members will be good stewards for the business and the employees going forward."



FOOTBALL Index has agreed a deal to become the front of shirt sponsor of English League Two side Notts County for the month of January 2019, further boosting its sponsorship portfolio.

The football stock market's branding will hold pride of place during vital home clashes against Cambridge and Newport County, as well as away games versus Colchester and Yeovil.

The announcement marks another prominent partnership for the financial and football hybrid, which also sponsors Bristol Rovers and boasts John Motson and Guillem Balague as ambassadors.

AFTER successfully obtaining its Swedish gaming licence, Bethard announced another national licence – this time, from Ireland.

The Irish Revenue Department has granted Bethard Group a remote bookmaker's licence. It means Bethard has now secured five national gaming licences in Europe, with the company is expecting further licences in 2019.

"We are moving forward at an exceptional speed and I think we have managed to demonstrate our sincerity in our ambition to create Europe's leading betting company," said Erik Skarp, founder and CEO of Bethard Group.

"In less than one year, we have moved from being a small Swedish niche player, to a force that is to be reckoned with in a much larger arena. And this is just the beginning."



POKERSTARS has announced a new marketing sponsorship with UFC, the martial arts organisation.

PokerStars is now the official poker partner of UFC and has a branded presence inside the Octagon, the cage used for the big pay-per-view fights including UFC 232: Jones vs Gustafsson 2, which was held in California on December 29.

Other partnership branding opportunities for the event will include the integration of PokerStars branding during the telecasts and digital and social media.

WILLIAM Hill's non-executive director David Lowden is to step down from the board after accepting a position as chairman and independent non-executive director of healthcare and communications group Huntsworth.

Lowden takes up his new role on January 1, 2019, becoming chairman of the Huntsworth board and its nomination committee as of March 6, 2019.

The additional commitments mean that Lowden has informed William Hill of his decision to step down as of March 4, 2019.

William Hill chairman Roger Devlin said: "David has been a valued member of the board and I am particularly grateful for his counsel and support since I took on the role of chairman."

GVC Holdings has announced a multi-year extension to its existing B2B supply agreement with Danske Licens Spil, one of the largest betting and gaming organisations in Europe.

Danske offers a variety of gaming products in Denmark including the national lottery, numbers games, instant games and gambling on machines.

GVC – and previously bwin.party, the business acquired by the Group in 2016 – has supplied online gaming and poker content to DLS since January 2012, when the Danish market first regulated. The new agreement marks the second time that the contract has been renewed, having previously been extended in 2015.

Through its agreement with GVC, DLS has access to the group's extensive portfolio of gaming content, including titles from third-party suppliers as well as exclusive games developed by the GVC's in-house development studios.

BETWAY has signed new deals with Market Rasen and Sandown Park in the UK to be major race sponsors at two ITV-broadcasted meetings this summer.

To be run as the Betway Summer Hurdle and Betway Summer Plate at Market Rasen on Saturday, July 20, 2019, the online bookmaker will sponsor two of National Hunt racing's major summer races before moving on to two big days of Flat racing at Sandown.

The Group Three Solario Stakes, won by last year's Derby hero Masar in 2017, and Atlanta Stakes, also contested at Group Three level, will both carry the Betway name, while sponsorship of two other races at the two-day Eclipse Meeting will give Betway exposure on both Friday, August 30, and Saturday, August 31, at the Esher track.

Betway has also agreed three important sponsorship extensions, which will see the bookmaker head into a third year sponsoring key races at Wincanton, with the Betway Kingwell Hurdle on February 16, Newmarket on May 18, where the firm will continue its association with the Betway King Charles II and Sprint Trophy Stakes, and Haydock for the Betway Achilles, John of Gaunt and Pinnacle Stakes on June 8.

888 HAS announced it has taken up the remaining 53 per cent of shares in the All American Poker Network, paying US\$28m through its US subsidiaries.

The acquisition sees 888 US and 888 US Holdings take over the remaining interest from a joint venture established with Avenue OLG Entertainment in 2013, ahead of the launch the same year of the 888poker and 888casino brands in New Jersey. The latest move is designed to give the group independent control of its growth strategy in the US, including signing new partnerships and continuing to deploy its proprietary products and technology (both B2B and B2C) in new states as they regulate.

The consideration of \$28m will be satisfied all in cash, with US\$10m payable immediately and the remainder due by March 31, 2019.

Over recent months, 888 has strengthened its position in the US by launching 888sport in New Jersey and signing a sponsorship agreement with NFL club New York Jets.



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HEADLINES

MAZOOMA, the source for verified bank payments in online sports betting and igaming, has been announced as the US ACH provider for Kindred.

For online sports betting payments, eCheck Select provides the real-time ability to verify bank-level data – specifically, consumer identification and account information. At the time of transaction, eCheck Select can confirm a consumer's account balance and process the payment or terminate it when there are insufficient funds.

eCheck Select supports real-time verification and payments from every bank and financial institution in the US.

LIVE casino solutions provider Evolution Gaming has signed a new agreement with existing client **Unibet** for the US market.

Unibet already works closely with Evolution in Europe, where it operates using Evolution's generic Live Casino tables, a dedicated environment at Evolution's Riga studios and a selection of native speaking tables at Evolution's Malta studios.

As part of its first foray into the US market, Unibet will use Evolution's new US studio, which opened in Atlantic City in mid-August, to deliver Live Casino services to players in New Jersey.



FANTINI INDEX

THE Fantini Interactive Index is computed based on the month-end stock price (adjusted for dividends and splits) of each company and weighted based on approximation of market capitalisation.

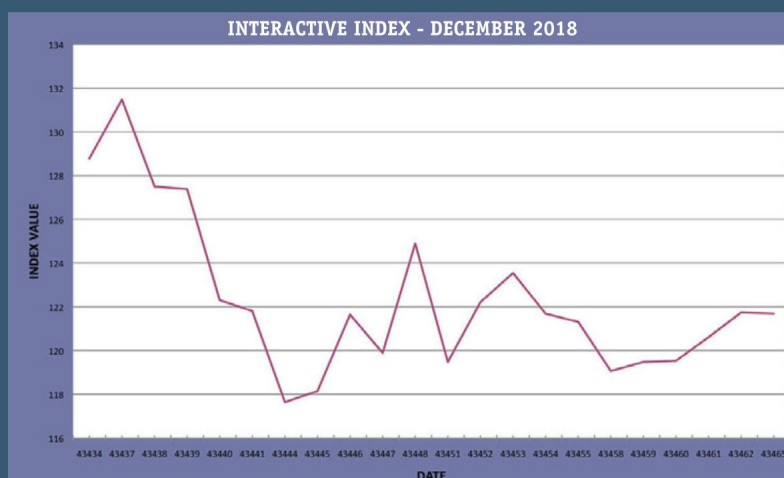
Market capitalisations for companies trading on foreign exchanges have been converted to US dollars for comparability purposes.

Fantini's Interactive Index is based on a 100-point value as of December 2011.

For all the latest gaming data from Fantini Research visit www.fantiniresearch.com

DATA INTERACTIVE INDEX

COMPANY	DECEMBER 2018
888	5.71%
Betsson	0.12%
GVC	-9.62%
Kindred	-7.35%
Lotto 24	-1.23%
Paddy Power Betfair	-13.79%
Philweb	0%
Playtech	-3.82%
Sportech	6.38%
William Hill	-4.83%



#EVENTS

MARCH 12-14:

iGaming Asia Congress 2019, Studio City, Macau
info@beaconevents.com
www.igamingasiacongress.com

iGaming Asia Congress, which is now in its 11th year, is the longest-running dedicated igaming event in Asia. It provides the opportunity for igaming operators to gain the latest market, product and market insights from industry experts and network with leading county authorities, top solution suppliers and marketers around the world. This year's event again features the iGA Start-Up Launchpad, allowing regional and global start-ups to gain attention from industry leaders.



Online gaming events

FEBRUARY 5-7:

ICE London 2019, ExCeL London Exhibition Centre, London, UK
stuart.dacre@clarionevents.com
www.icelondon.uk.com

FEBRUARY 6-9:

London Affiliate Conference & Financial Partners Expo 2018, ExCel, London, UK
alana@igamingbusiness.com
www.igbaffiliate.com/events/londonaffiliateconference/

FEBRUARY 25-27:

SPICE India 2019 – Strategic Platform for iGaming Conference and Exhibition, Goa Marriott Resort and Spa, India
info@eventus-international.com
www.sportsbettingevents.com/spice-india

MARCH 4-6:

LeadsCon Las Vegas 2019, The Mirage, Las Vegas, Nevada, US
www.leadscon.com/leadsconlv

MARCH 19-22:

Betting on Football 2019, Stamford Bridge, Chelsea Football Club, London
andy@sbcnews.co.uk
www.sbcnews.co.uk/betting-on-football-2019

MARCH 21-22:

Affiliate Grand Slam Manila 2019, Philippines
info@sigma.com.mt
www.affiliategrandslam.com

MARCH 25-26:

BiG Africa Super Show 2019, Emperors Palace, Johannesburg, South Africa
enquiries@eventus-international.com
www.bigaficasummit.com

MARCH 27-28:

Nordic Affiliate Conference 2019, The Grand Hotel, Stockholm, Sweden
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www.igbaffiliate.com/events/nordic-affiliate-conference



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Top performers

Data experts *Casino City* provided *iNTERGAMINGi* with their list of top 10s in 2018 across casino, sports, bingo and poker

SPORTS BETTING SITES

2018 RANK	CHANGE IN RANK	NAME	WEBSITE	OWNER
1	–	bet365 Sportbook and Racebook	bet365.com	bet365 Group
2	↑6	Caliente Sports	sports.caliente.mx	Grupo Caliente
3	↑2	Unibet Sports and Racebook	unibet.com	Kindred
4	↑3	Parimatch	parimatch.com	Parimatch
5	↓3	bet365 Spain Sportsbook and Racebook	bet365.es	bet365 Group
6	–	William Hill Sportsbook and Racebook	sports.williamhill.com	William Hill
7	↑12	Bet9ja	bet9ja.com	KC Gaming Networks
8	↑9	Hong Kong Jockey Club	hkjc.com	Hong Kong Jockey Club
9	↑14	Hollywood Bets	hollywoodbets.net	Hollywood Sportsbook
10	↑1	Nesine.com	nesine.com	DOL

CASINO SITES

2018 RANK	CHANGE IN RANK	NAME	WEBSITE	OWNER
1	↑2	Sunmaker	sunmaker.com	Cherry
2	–	888 Casino	888.com	888 Holdings
3	↑1	Sunny Player Casino	sunnyplayer.com	Cherry
4	↑1	Lapalingo	lapalingo.com	Rabbit Entertainment
5	↑5	Mr Green Casino	casino.mrgreen.coms	MRG
6	↑6	Unibet Casino	unibet.com/casino	Kindred
7	↑6	Sky Vegas	skyvegas.com	Stars Group
8	↓1	LeoVegas	leovegas.com	LeoVegas
9	↓3	JackpotCity Casino	jackpotcitycasino.com	Bayton
10	↓1	Casumo	casumo.com	Casumo Services

BINGO SITES

2018 RANK	CHANGE IN RANK	NAME	WEBSITE	OWNER
1	–	Tombola	tombola.co.uk	Tombola International
2	↑6	Mecca Bingo	meccabingo.com	Rank Group
3	↑3	Sky Bingo	skybingo.com	Sky Betting and Gaming
4	↑3	Gala Bingo	galabingo.com	Ladbrokes Coral
5	↑4	The Sun Bingo	sunbingo.co.uk	News Group Newspapers
6	↓2	Heart Bingo	heartbingo.co.uk	Gamesys
7	↑3	Bingo.com	bingo.com	Kindred
8	↓6	Bingo Hall	bingohall.ag	Digital Entertainment Services
9	↓4	Botemania	botemania.es	Jackpotjoy
10	↑1	Tombola - Italy	tombola.it	Tombola International

POKER SITES

2018 RANK	CHANGE IN RANK	NAME	WEBSITE	OWNER
1	↑5	PokerMatch	pokermatch.com	Inplace
2	↓1	PokerStars	pokerstars.com	Stars Group
3	↓1	888 Poker	888poker.com	888 Holdings
4	–	partypoker	partypoker.com	GVC Holdings
5	↓2	PokerStars Europe	pokerstars.eu	Stars Group
6	↑3	Winamax Poker	winamax.fr	Winamax
7	↑1	Global Poker	globalpoker.com	GW GP Malta
8	↑3	PokerStars Spain	pokerstars.es	Stars Group
9	↓2	Americas Cradroom	americascardroom.eu	Winning Poker Network
10	↑4	PokerStars Italy	pokerstars.it	Stars Group



More than 50 complimentary top lists are available on Casino City's *iGamingDirectory.com* website, each customisable based on your choice of time frame and geographic region. Rankings and ranking changes are estimated using statistical data and should not be considered absolute ranking values. Visit *iGamingDirectory.com* for a free trial to see additional and updated top lists.

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HEADLINES

GAMING operator Intralot has announced the appointment of Fernando Ors Villarejo as president of sports betting within its US subsidiary.

He joins Intralot boasting over 20 years of experience in international development and over 15 in digital businesses. Founder of Savia Consulting, he is a former member of the chairman's office and CDO at multinational sports betting and gaming corporation Codere Group.

Intralot Group CEO Antonios Kerastaris stated: "It is my great pleasure to extend a warm welcome to Fernando. In the new era of sports betting in the US, Fernando will be our key person for opening up this immense new opportunity for Intralot, with end-to-end responsibility on the sports betting product and operations."

"Sports betting in the US in the post-PASPA era is a major source of potential future revenue and profits for Intralot and we intend to dedicate considerable amount of effort and resources to turn this opportunity into a great success for our company."

BETTING technology firm Sportech has announced the appointment of Chris Rigg as an independent non-executive director, effective as of January 1, 2019.

Rigg has previously held both non-executive and executive directorships at Clinigen and Quantum and in the latter role, implemented a new strategy which helped simplify and grow the business ahead of the acquisition of Quantum by Clinigen for an enterprise value of £160m.

Richard McGuire, executive chairman of Sportech, said: "We are delighted to welcome Chris to the board. His extensive experience at a senior level within public and private companies will undoubtedly be of great value to Sportech."

DRAFTKINGS will launch its online and mobile sports book in West Virginia, US, through an agreement with Penn National.

William Hill operates the retail sports book at Penn's Hollywood Charles Town casino.

More than 90 per cent of bettors return to DraftKings after trying the sports book, COO Matt Kalish said.

Elsewhere, DraftKings integrated an online casino into its sports book through Resorts AC's licence. It is available on Android with an iOS launch following soon.

SPORTS betting operator SKS365 has announced the roll-out of Wiraya's software for automated customer interactions for their core brand planetwin365, with an initial focus in the Italian market.

This approach is designed to deliver an enhanced customer experience to generate increased conversion rates.

Adalbert Wisniewski, head of sales operations for SK365, said: "We have always tried to have a player-centric culture, and we wanted to make all our customer communication touch points as personalised as possible. This means moving beyond the traditional, un-targeted mass-

BOOKMAKER William Hill has been given the regulatory go-ahead to complete its €270m acquisition of MRG Group.

The company stated that it had "been granted approvals from the competition authorities in all necessary jurisdictions" concerning the deal, which forms part of William Hill's strategy to boost its presence in Europe and also within the Nordics.

The final offer of SEK2.8bn (£246m) was worth SEK69 per share.

MRG operates in 13 markets including Denmark, Italy, Latvia and Malta, and has brands including Mr Green and Redbet. The firm was also recently granted licences in Sweden.

William Hill CEO Philip Bowcock, commenting on the original tabling of the offer to MRG, said: "MRG will provide William Hill

with an international hub in Malta with market entry expertise and strong growth momentum in a number of European countries. William Hill will move from a single brand to a suite of brands that can maximise growth opportunities moving forward in new and existing markets."



marketing messages that so many operators use to approach players.

"While enhancing the experience for our players is key, ultimately, we feel by using Wiraya, we can build intelligence into our systems, targeting the right players, at the right time, to increase the customer lifetime value for the business."

MULTI-channel supplier Sports Information Services has agreed a deal with the Codere Group to provide online and retail operators with live pictures and data from its four racecourses in Latin America.

The new partnership will include a minimum of 3,892 races per year from the Hipódromo Presidente Remón racecourse in Panama City, the Hipódromo de las Américas in Mexico City, the Hipódromo Nacional de Maroñas and the Hipódromo de las Piedras, both in Uruguay.

The high-quality races will be included in SIS' recently launched 24/7 Live Betting Channels, which offer operators a watch and bet channel with a betting event every three minutes throughout the day regardless of time zone.

Simon Fraser, head of international horseracing at SIS, said: "This is an exciting partnership for us and further enhances our 24/7 channels, adding more quality horse racing that will prove popular with bettors across the globe."

SPORTRADAR has welcomed the U-turn on live data sales by the Independent Review of Tennis Integrity, but believes the panel could have gone further.

An original recommendation to discontinue sale of live data at the \$25k level of the sport has been reversed, but for the former ITF \$15k range tournaments the panel endorses taking such a firm stance.

The report states that online betting and sales of official scoring data have hugely contributed to integrity issues at tennis' lower levels, with the sale of data allowing thousands of matches to be available for betting and enabling players and officials to bet and act corruptly more easily. It recommends removing incentives for integrity breaches; establishing a newly empowered

tennis integrity unit with independent supervisory boards; preventing breaches through education, control of access and disruption; enforcing expanded integrity rules and punishing offenders; and for national authorities to develop national and international regulation and enforcement.

In response, David Lampitt, managing director of group operations at Sportradar, said: "We welcome the fact that the panel has reversed its recommendation to discontinue sale of live data at the \$25k level of the sport, however we believe that it could and should have gone further."

"This is for two reasons: a targeted approach should be applied across the whole sport; we have been consistent in our view that the panel invites new risks and problems by recommending a prohibitive approach, when it has not succeeded as an effective regulatory tool in relation to the betting industry anywhere in the world, nor in any other sport."

"Adjusting their arbitrary line (between targeted approach and blanket discontinuance) down a level doesn't stand up to scrutiny. This is because the measures don't match the risks and the panel's approach remains disproportionate. They now accept a targeted approach as the most effective response for almost every level of tennis, including quite correctly those levels above the ITF that evidence the highest level of risk."

"It then makes no sense that they have doggedly maintained a solution that is more draconian, expensive, complex and unpredictable for the \$15k tournament level that has lower risk."

"Our experience borne of more than a decade investing in the best programmes to fight integrity corruption in sport, is that a targeted approach, where the key stakeholders cooperate and invest into detection, prevention and education rather than prohibition is the most effective way forward for all levels."

"Now that the panel's work is finally complete, we look forward to working with our trusted partners and the wider tennis family to deliver the best solutions to protect the integrity of the sport."



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The huge popularity of in-play betting shows no sign of abating, but what does the future hold in terms of innovation, geographical reach and the role of the trader?

INTERGAMINGi explores the issues

THE rise and rise of in-play betting has been a real boon for sportsbook and now makes up close to four-fifths of revenues for operators.

With players having been used to find out how they see where in-play betting moves next.

INTERGAMINGi spoke to three experts to find out how they see where in-play betting moves next.

Simon Noy, Kambi's head of in-play, believes that in-play betting will continue to be the main turnover driver within Europe, particularly as players continue to seek more instant forms of sports bets.

"We foresaw this trend some time ago with the creation of our instant betting markets, which we offer across a wide range of sports and are increasingly enjoyed by players," he says. "In the US, in-play will continue to grow as players keep learning about high quality in-play products. Since first launching in the US in August, we have been seeing a steady increase in in-play betting, particularly through the many unique markets we offer such as next field goal – two or three points in the NBA."

**JEEVAN JEYARATNAM ,
ABELSON INFO:**

"Football is still the big in-play driver and a fully immersible, end-to-end bet-builder solution, with cash-out options, will only further the gap between it and other sports."



For **Jeevan Jeyaratnam** of Abelson Info, the next logical progression for in-play betting around soccer could revolve around the biggest innovation of the past couple of years – build-a-bet.

"The ability to compile and, perhaps more importantly, cash-out these wagers in-play is a step that a few smart third-party providers have recently begun to take. This will surely increase player engagement, while also improving margins for operators."

Beyond that, he believes there is plenty of scope for innovation towards in-play success across other sports, with the NHL providing a particularly eye-catching example.

"Football is still the big in-play driver and a fully immersible, end-to-end bet-builder solution, with cash-out options, will only further the gap between it and other sports."

"Barry Hearn's extended PDC darts tour and finals has really seen an upsurge in interest, with ever more granular data being made available there are now extensive market options for punters, both pre-match and in-play."

"Elsewhere, NFL has a huge fan base in the UK and with the PASPA repeal, a whole new market has opened up. It is a sport that lends itself really well to in-play wagers and I'd expect to see increasing interest in this product, especially around player props."

"I also read recently of an NHL showcase, where selected firms (from different industries) were invited to build innovative uses for the data collected, via chips, in each players' shoulder pads. The results, extending from virtual reality viewing to total player skating distance, has real potential. The NHL – often seen as the weakest US sports proposition – should be commended for such prescience."

Darren Small, Sportradar's managing director trading services, agrees that in-play betting has become established as the key driver of sports betting, while also pointing to high-turnover, data-rich US sports as being prime for innovation.

"A rich event coverage is the basis of every operator and there is no way around this," he says. "That said, I expect fan engagement and customisation will play an even more important role. With the demographical development of punters, and support of the media, betting on individual player performances will, without a doubt, gain more attraction."

"Consequently, player markets will increasingly appear in the in-play offer of operators and, likewise, will become standard for most successful sportsbooks."

"When it comes to innovation within the sports betting industry, sports with the highest turnovers are primarily targeted. This has been the case with recent innovations such as Rapid Markets, Cash Out and CustomBet with football. I believe this trend will continue too, where sports with high turnover and high fan engagement will be where we see innovation continuing."

"With the opening of the US betting market, sports like American football, basketball and baseball are in the spotlight as well. The rich amount of data available from these sports, combined with intelligence, offers the best foundation for innovation."

Horse racing, though, is one sport where in-play has not really experienced lift-off, with a perceived reluctance on behalf of regulators to provide suitable conditions for such products.

"I've been discussing this for some years, and to be honest, nothing really seems to have advanced," says Jeyaratnam. "Back in 2017 (INTERGAMINGi issue 4) I said: 'The success of such a product depends on data aggregation. Data drives algorithms, given that there hasn't been any substantial tracking of this data previously, there will need to be a period of data collection and analysis before operators will be confident in their algorithms.'"

"It seems that we haven't really moved too far forward from this. Though there are in-play fixed odds opportunities available with some operators, the scope isn't what it could be. Most of the blame is probably at the door of the regulators who continue to be reform averse, in stark contrast to the NHL example I cited above."

In Small's view, there are technical reasons that lay behind the failure of in-play racing to gain widespread traction.

"As a sportsbook product, live or in-play betting is essential to any serious sports betting business. The same is not so true when it comes to horse racing."

"Live or in-play horse racing has been available in the market for many years, most notably with the Betfair exchange and more recently with operators like Bet365."

"Nevertheless, there are a few barriers for mass adoption. The broadcast of domestic racing, while live, still has significant delays, meaning the strength of the betting exchange market often discloses results or substantial changes in circumstance before the armchair consumer can process this information and attempt a transaction."

"The real-time data currently required isn't widely available and, where this data can be collected and distributed, the cost is so prohibitive that it raises serious questions around profitability."

Kambi, Noy says, is focused strongly on continually improving its products across all sports.

"Of course, with the recent repeal of the federal sports betting ban in the US, there will be a lot of operators and suppliers looking to improve their offer in the core US sports and we're always exploring ways in which we can bring greater excitement to players."

"That said, Kambi is partnered with operators in a large number of regulated markets spread across six continents, with each market having its own unique demands and popular sports, so we can't and don't have a narrow focus."

"For instance in South Africa, golf, cricket and rugby union are very popular sports, while in Sweden it's more centred on football, tennis and ice hockey. This means we have to take a broad

approach to in-play innovation from esports to basketball, rather than focus on just one or two sports."

In terms of its development to date, Noy says that there haven't been too many surprises so far in the direction of travel for in-play betting.

"We anticipated the demand for more instant bet types as well as the fundamental UX of the main markets – keeping things open and available to bet on at all times.

"We were also ahead of the curve in offering in-play player props after identifying a trend towards more player-focused markets. Going further back, we were first to develop cash out and it's plain to see how popular that product has become across the industry.

"In general, the broad trend has been to give players more options and more control over their betting and that is what we always strive to do at Kambi and, as you'll see at ICE, we'll soon be launching our new BetBuilder product which comes with full in-play and cash out functionality – a first for a B2B supplier."

Sportradar's Small believes that a technological evolution has taken place, creating the perfect conditions for the in-play boom.

"I am sure no-one at the time knew how significant in-play would become, the depth or breadth that it would be applied to, or the ripple effect it would cause. Availability of live sport, advances in technology and trader tooling has made its expansion possible.

"This evolution has helped increase the interest in betting, while helping educate customers on greater betting interactivity and paved the way for the swathe of innovations we see today, such as Bet Boost, Cash Out and CustomBet.

“I AM SURE NO-ONE AT THE TIME KNEW HOW SIGNIFICANT IN-PLAY WOULD BECOME, THE DEPTH OR BREADTH THAT IT WOULD BE APPLIED TO, OR THE RIPPLE EFFECT IT WOULD CAUSE. AVAILABILITY OF LIVE SPORT, ADVANCES IN TECHNOLOGY AND TRADER TOOLING HAS MADE ITS EXPANSION POSSIBLE”

Darren Small, Sportradar



"It also led to the development of initiatives such as our own market-leading Integrity Services, which maintain the integrity of the betting markets now globally available today. It is clear that in-play has had a huge visible and invisible impact."

When it comes to the overall in-play picture in the US, Small expects the market domination of the spreads, totals and money-line line-up to expand sooner rather than later.

"Player markets exist already to a limited extent at the professional level, but will be extended down to college level. The need for markets with frequent pay-out cycles is another trend which can't be stopped. Play-by-play markets in American football, or pitch-by-pitch markets in baseball, will provide the punter with betting options from the very first to the very last minute of the match. This will be key for the US."

In terms of the potential scope of in-play markets in the US, Jeyaratnam says that much will rest on the intentions of the individual sports themselves.

"I'd venture that it is nigh-on impossible to predict the full extent of the scope for in-play enhancement within the US. It remains to be seen how many of the states will go on to adopt a legalised sports betting framework, but the expectation is that many of them will. If that happens the only blocker to immense in-play revenues will be each sport's governance committees.

"While there has been a thawing in the previously frosty relationships with gambling it will still require the right symbiosis of tax, royalties and operator margin to make the desired impact."

In the UK, Small does not believe that the upcoming ad blackout during live sport will have an adverse impact on live betting, with resources simply diverted elsewhere.

"The fact that it was conceded relatively easily supports this view. Parallel experience from Australia also shows that operators will redeploy their media spend in other ways to stimulate betting activity. This will offset any impact the ban is likely to have."

For Jeyaratnam, while in-play awareness is already widespread, he believes the ban will have an effect.

"There's no doubt the ban will affect turnover but there's also an argument to suggest the message has already made it through to the masses. There aren't many punters that don't know you can bet in-play. That said, it would be naive to think there won't be an impact on revenues.

"You only have to look at the furore in Italy regarding a blanket advertising ban to see how the operators view the legislation. This opposition comes despite the Italian market being noticeably different. Retail is still the dominant channel; their ruling looks set to prolong that particular trend."

Finally, with all the advancements when it comes to automation, is there still a positive future for the physical trader?

The answer, Noy says, is an emphatic yes.

"Skilled traders are an essential part of the Kambi trading and risk function and enables us to offer our customers a market leading in-play service. Automation hasn't and won't make human traders obsolete but rather evolve the

role traders carry out. In our view, automation is only effective when blended with trader skill and experience.

"For instance, only an experienced trader can identify when a particular tennis player may be moving uncomfortably, or whether the spread of balls on a snooker table favours a right or left-handed player.

"Also, at Kambi, we aim to keep markets open for longer, even during the most pivotal moments, such as a penalty situation in a football match where traders can override the automated trading function to allow bettors to place bets right up until the penalty kick is taken.

"While traders no longer manually perform each and every in-play trading task, they remain pivotal to providing an exciting sports betting experience in the moment, and on top of that they play a major role in feeding back into our model and trading tool innovation process."

The increased automation and efficiency that technology is creating has called into question a number of roles within the trading environment, Small says, in a similar fashion to most industries.

"Despite this, the trader will not disappear from the trading floor. Their knowledge and intuition can and will still play a significant part in the development of algorithms and artificial intelligence technologies for many years to come.

"As we see it, the current traders will evolve into more data analytical type roles, supporting the automation, managing the 'machine' and analysing the trends and statistical anomalies. It's important to remember that sport is not entirely predictable and so the nuances interpreted by the human eye are still very important to help generate the strongest reflection of an outcome's probability. In addition to this, there are still some sports that prove extremely difficult to automate, such as snooker or kabaddi, either due to the complexity of the rule set or lack of real-time data, meaning manual expert sports knowledge is still a premium.

SIMON NOY, KAMBI:

"Skilled traders are an essential part of the Kambi trading and risk function and enables us to offer our customers a market leading in-play service."



"The future of the trader is good, but like the introduction of live/in-play betting, their skillset and knowledge has to evolve for them to keep some skin in the game."

Jeyaratnam agrees, believing there will always be a place for manual oversight at a sportsbook.

"Whether the title 'trader' is the most accurate description has been in question for some years. With advancements in customer profiling, which previously took up a huge part of a trader's time, the focus shifted to calculating client 'request-a-bet' queries. Automation is making this job less labour intensive, but there are still many tasks that require human input. We aren't quite ready to do away with the trading floor, just yet!"



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HEADLINES

THE Industry Group for Responsible Gambling has confirmed it is to implement a “whistle to whistle” ban on all TV betting adverts during pre-watershed live sport in the UK from next summer, starting five minutes before the event begins and ending five minutes after it finishes.

The move comes as the IGRG announced major changes to its Gambling Industry Code for Socially Responsible Advertising. The changes – which effectively stop betting adverts from being shown in commercial breaks during live sport – exclude horse racing and greyhound racing programmes.

John Hagan, Chair of IGRG, said: “We believe that these new voluntary TV measures, which have been approved by the trade associations representing every sector of the gambling industry, will drastically reduce the amount of gambling advertising on television and they complement the strict controls that already govern gambling companies around advertising on digital platforms.

“We believe that this is itself a watershed moment as we strive to provide the ever safer gambling environment which gambling consumers and the wider public expect, and which is so important to the future success and sustainability of our industry.”

THE Malta Gaming Authority has launched the first of two phases of its sandbox framework for the acceptance of virtual financial assets and the use of distributed ledger technology within the gaming industry.

During this phase, the Authority will be accepting applications for the use of DLT assets, directly or through third party service providers, by its respective licensees.

This phase is planned to last for a period of 10 months, subject to an extension if deemed fit by the MGA.

The Authority has also updated its licensee relationship management system to allow new operators to apply for approvals for the use of DLT assets as part of a new licence application; existing licensees to apply for approvals for the use of DLT assets; and existing licensees participating in the sandbox environment to report VFA player liabilities through the monthly player funds report. Licensees will also need to report any failed return transactions, with respect to any invalid deposits.

THE Danish Gambling Authority has determined that the number of websites offering gambling products to domestic players is “continuously low”, though those sites with illegal marketing and promotion of gambling still pose a challenge for the regulator.

A report produced by the country’s Spillemyndigheden regulator stated that in 2018, the Authority conducted three web searches of potentially illegal websites in collaboration with the Danish Tax Agency’s anti-fraud unit.

After finding 742 problematic sites, 18 of the offending examples were blocked by local service providers at the behest of Spillemyndigheden.

While finding a low number of illegal products

overall, the regulator stated that there is an increasing problem of illegal gambling through Facebook and has so far worked to close four Facebook groups.

Skin betting is also a concern and the Authority expects to include 20-25 skin betting sites in its next blocking session.

PLAYTECH is to pay Israel’s tax authorities a total of €28m following a civil tax audit covering a decade’s worth of accounts.

The additional payment, covering the years 2008 to 2017, means that no penalties will be imposed as a result of the audit.

This additional tax charge will be reflected as an exceptional item in Playtech’s 2018 accounts and payment is expected to be made in the next 30 days. The news follows on from Playtech announcing that changes to gambling legislation in Italy will reduce the firm’s expected adjusted EBITDA by between €20m and €25m.

JUST a week after legislators in the US state of Michigan pushed through an online gambling bill in a late-night legislative session, the bill is dead.

All it needed was Michigan Governor Rick Snyder’s signature, but he decided to veto the bill. This effectively ends Michigan online gambling hopes until the next legislative session. The online gambling bill was one of 40 bills Snyder vetoed, according to *Detroit News*. In fact, every gaming-related bill got the axe. When asked why he acted against online gambling, Snyder claimed that a lack of clarity regarding budgeting and revenue was the issue.

THE American Gaming Association has reacted against what it describes as “federal government overreach” on sports betting.

Sens Chuck Schumer and Orrin Hatch introduced a bill requiring approval of state sports betting laws, setting minimum standards for legislation and to create a non-profit agency to share data.

AGA senior vice president of public affairs Sara Slane said: “This bill is the epitome of a solution in search of a problem, representing an unprecedented and inappropriate expansion of federal involvement in the gaming industry, which is currently one of the most strictly regulated in the country.

“Across the country, nearly 4,000 dedicated public servants already regulate all forms of gaming, including sports wagering, with more than \$500m committed to ensuring the integrity of commercial casinos’ operations and \$822m spent on regulation of tribal gaming in 2015 alone. These state and tribal regulators have decades of experience effectively overseeing gaming operations within their jurisdictions.

“Additional areas this bill seeks to address – including the mandatory use of official league data and the creation of a national sports wagering clearinghouse – can, and should, be decided by marketplace negotiations between private businesses and cooperative agreements among jurisdictions. In the mere six months since the US Supreme Court paved

the way for legal, regulated sports betting, significant developments on both of these fronts have already occurred without any federal involvement.

“While federal regulation of sports betting will continue to be a non-starter for the gaming industry, we appreciate the sponsors’ recognition that more must be done to curb illegal sports betting operations, which continue to pose the biggest impediment to the success of a legal market that will benefit and protect consumers, sports leagues and casino operators alike.”

THE UK government is talking of banning the use of credit cards to gamble.

Culture Secretary Jeremy Wright (pictured), is seeking “social responsibility” from all gambling companies as well as the banks. He will meet bankers and bookmakers to talk through the problem of players getting into debt by using cash they do not have.

The Gambling Commission is to call for evidence shortly on the use of credit cards for gambling online and offline. It may recommend the banning of the practice. Wright wants all banks to follow the example of some of their colleagues in permitting card users to disable spending on gambling through mobile apps.

It is thought that as much as 20 per cent of spending on gambling online is through credit cards. Wright has warned that if the gambling industry does not take action itself then it may be necessary to bring in legislation to curb the use of credit cards for gambling and operators risk losing their licences.



THE regulated sports betting market in Italy has posted revenue growth of 22.6 per cent year-on-year to €1.6bn in 2018, according to reports locally.

Research firm Eilers and Krejcik has estimated that €640m came through online sports betting – a rise of 16 per cent year-on-year – and €950m through the land-based sector, up 23 per cent compared to 2017’s figure. The land-based sector also benefited from turnover growth and a margin of 17 per cent.

Online sports betting posted a margin of 10 per cent for the year, with turnover at €6.4bn, up 14 per cent.

The wider Italian online gambling market posted revenue growth of 17 per cent, with online casino growth of 25.4 per cent to reach €711m. That compensated for a 3.7 per cent fall in online poker revenues to €147m, for a total market size of €1.5bn from the core sports betting, poker and casino verticals.

A refreshing change

Andrew Clucas, chief operating officer at Microgaming, and **Erkki Nikunen**, partner and CMO at Finnplay, discuss their respective entrances to the re-regulated igaming market in Sweden



INTERGAMINGi: Of how much strategic importance to your company is the re-regulated Swedish market?

Erkki Nikunen: "We consider Sweden our 'home market' and we have the majority of our customers targeting Sweden. So being able to continue to allow our customers to operate in the Swedish market was paramount to Finnplay. And as we see it, the re-regulation will only make it more important for us. Securing the licence for ourselves opens new doors for the business."

Andrew Clucas: "Sweden is an important market for Microgaming and our launch into it, following its regulation on January 1, follows our successful entries into Colombia, Bulgaria and Denmark in 2018."

"As one of Europe's largest markets, home to many of the industry's biggest names, Sweden's re-regulation is particularly significant for us as a content supplier, with over 40 operators and hundreds of brands going live with our content in the country."

How have you gone about localising your content for Sweden?

AC: "We developed a bespoke solution on our award-winning entertainment platform in line with the regulatory framework set out by the regulator, enabling operators to access localised content tailored specifically for the market."

"Our compliance team have had their fingers on the pulse since Sweden announced re-regulation, working together with local experts to scope out the new standards that would later enable our teams to assist our operators throughout the process."

"We leveraged our technical talent to closely support and meet key deadlines to ensure the new builds are compliant and efficiently deployed, and we collaborated with independent studios to react to localised demands for content."

EN: "Currently, the localisation of the content has mainly been securing the providers who are compliant in the Swedish market. But more and more providers will be entering the Swedish market, and we expect that there will be more Swedish specific gaming content."

What challenges were involved in ensuring compliance with the regulations set by the Swedish Gaming Authority?

EN: "The Swedish compliance presented a number of challenges and those needed to be delivered in a relatively short period. One primary example is the responsible gaming features, where, for example, a player can only have one welcome bonus per licence, regardless of the number of brands the operator has."

"Limits for deposits and losses have to be centralised and currently, there are many open questions regarding marketing, bonuses, etc, which will only be more defined once the market starts to shape those in the forthcoming months."

AC: "Time pressures are always a factor when a market regulates and sets a tight timeline for opening. Moreover, in the case of Sweden, given that the market opened on New Year's Day, there were additional challenges within the teams at Microgaming and our operators to ensure things ran smoothly over the festive period and in the lead up to the market opening."

"Another key factor was the large number of operators and games involved in this project, which was in itself a challenge – but one that was successfully overcome. That said, as with any market, there will always be teething problems which need to be addressed. But this is what we do best, and we are all acutely aware of the need to be quick, agile and adaptable in implementing complex solutions for our customers."

"Our content distribution is configured in such a way as to enable us to be flexible to move into regulated markets effectively and efficiently. Despite the challenges, our key focus of delivery is always player protection and offering a premium solution to the market – a goal that continues to push us forward each time."

What sets your platform apart as a supplier in the Swedish market?

EN: "Currently, the Finnplay platform is the only one which has integrated all digital KYC providers: Trustly, Zimpler and Entercash. Also, our player protection features turned into an entirely new platform and product, which we will be launching at ICE London. Naturally, we will say more about the product then."

How much planning went into setting up your fully integrated solution for operators?

AC: "Over the last few months, we have assisted and supported over 40 operators with entry into the Swedish regulated market, including PokerStars, Bet365, Leo Vegas, Unibet, Global

Gaming, Comeon, Coolbet, Genesis, BWIN and Betsson Group. All of these top operators have already received their licences and are now live with Microgaming's content in Sweden, with more operators preparing to be rolled out throughout the year."

"As you can imagine, planning for this volume of operators involved the coordination of teams from across the business who invested significant time, energy and focus to ensure all was ready to go when the new regulation came into effect on January 1. Preparation started as soon as the new regulations were introduced, followed by a comprehensive plan, which was implemented across all areas, including compliance, technical, marketing, game delivery, and so on."

"Externally, we liaised with numerous studios and content development teams from across the world, and worked closely with lawyers, regulators and certification bodies to provide operators a high level of assistance throughout the licensing application process, including supporting with technical or commercial questions, providing various required documentation, and delivering technical builds and games compatible for the market."

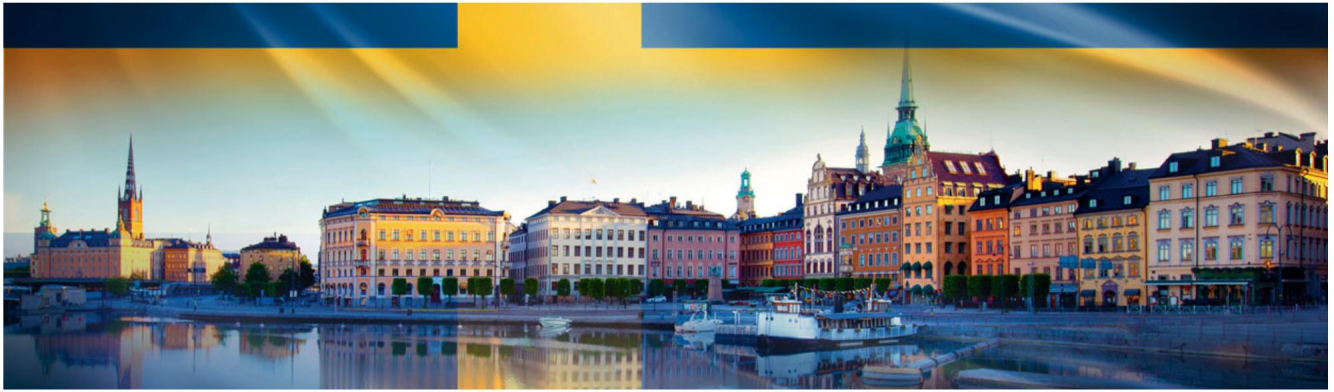
"What's more, the process provided us with the opportunity to continuously refine and optimise our global platform so we can be more agile, adaptable and flexible when deploying bespoke solutions to new markets."

What potential is there for suppliers and operators in Sweden in comparison to other regulated markets?

AC: "The Swedish market presents numerous opportunities for suppliers and operators in this new regulated environment. It has the potential to be one of the largest regulated regions in Europe in terms of revenue generated. Through its regulated portion of the gambling market alone, it generated SEK17.07bn (US\$1.8bn) in 2017, according to official data by Lotteriinspektionen."

"For international operators and suppliers, Sweden brings opportunities for new regulated growth. As a supplier we have a long history of success in regulated markets – as we are already in UK, Italy, Spain and a number of other regulated markets worldwide."

"Microgaming believe Sweden has the potential to be amongst the largest European regulated markets and we will be working alongside our operators and the regulator to make it a successful market in 2019 and beyond."

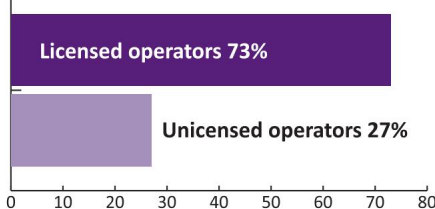


In numbers

INTERGAMINGi looks at the latest data from Sweden, with the market re-regulated from the start of 2019

Swedish market, Q1-Q3 2018

Market share



Online gambling **UP** 12.9%
 Land-based gambling **DOWN** 8.4%
 Betting **UP** 13.6%
 Online casino **UP** 11.9%

Svenska Spel

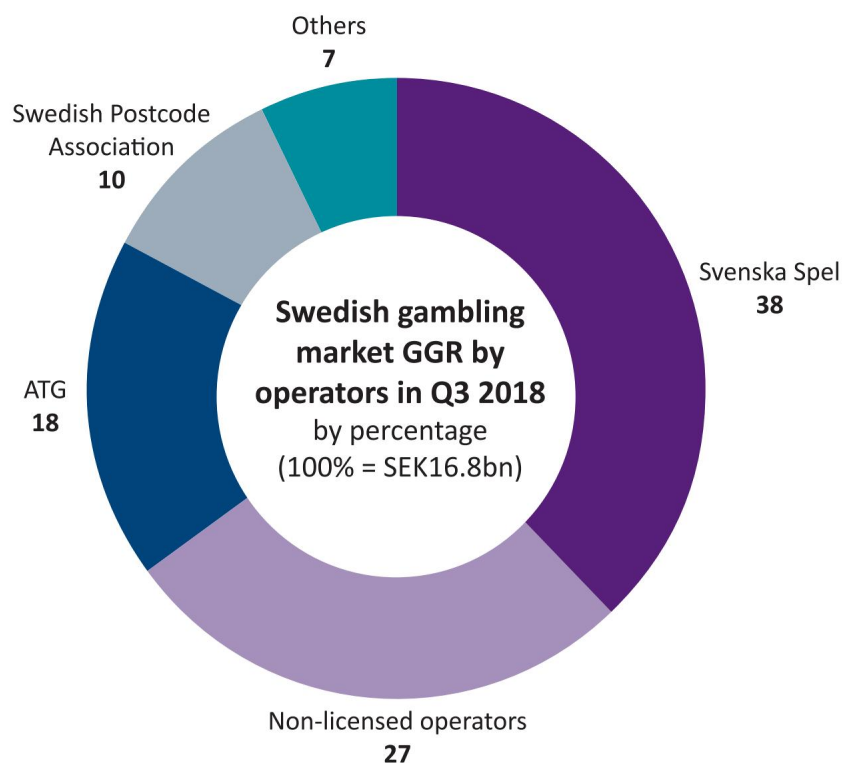
GGR **DOWN** 1.6% to SEK6.4bn
 Online gambling **UP** 22.5%
 Land-based gambling **DOWN** 9.4%

ATG

GGR **DOWN** 0.4% to SEK3.1bn
 Online gambling **UP** 6.7%
 Land-based gambling **DOWN** by 10.0%

Non-licensed operators

GGR **UP** 12.4% to SEK4.5bn



Operators with current Swedish licences:

888 Sweden • AG Communications • AHA Bingo • Auto Nordic • Baltic Casino • Bayton • Betfair International • Bethard Group • Betspawn • Betsson Nordic • Betway • Blue Star Planet • BS Nordic • Casino Cosmopol • Casinostugan • Casumo Services • Cerberus Technology • Cherry Casino Sweden • Cherry Spelglädje • Co-Gaming Sweden • ComeOn Sweden • Dumarca Gaming • ElectraWorks • Enlabs • Evoke Gaming • Expekt Nordics • Genesis Global • Hajper • Hero Gaming • Hillside (Sports) • Hillside (Gaming) • Interwetten Gaming • L&L Europe • Leisure Spin • LeoVegas Gaming • Mandalorian Technologies • MOA Gaming Sweden • Mr Green • MT SecureTrade • Multi Brand Gaming • NGG Nordic • Paf Consulting • Polar • SafeEnt • Skill On Net • Faster • Spooniker • SuprPlay • Svenska Spel • Svenska Spel Sport & Casino • Tipwin • Trot and Gallop • TSG Interactive • Tombola (International) • United Lottery Solutions • Videoslots • Viral Interactive • White Hat Gaming • XC Gaming Sweden • Zecure Gaming

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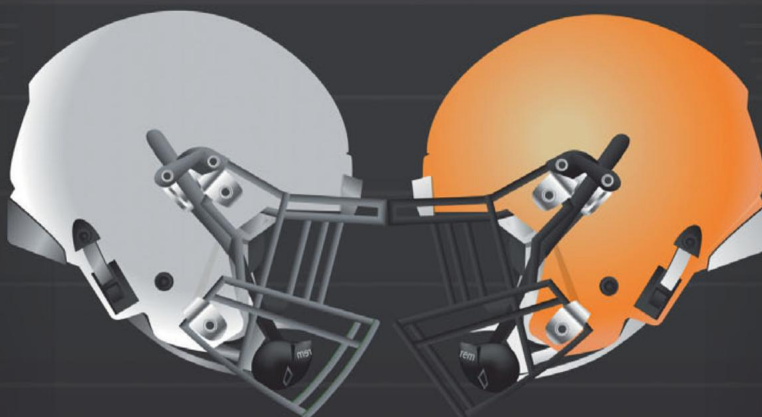
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Streams of content

Tony Ure, head of eGaming at Digital Isle of Man, examines what's in store at ICE London and picks out two themes: streaming and esports



I F anyone ever wanted a glimpse into the best our industry has to offer, then the annual ICE expo is certainly a good place to start.

I am yet to attend a conference that hasn't hugely impressed me, and every year I am extremely excited to see what will dominate the event agenda. ICE provides us, and other delegates, with the opportunity to meet our fellow colleagues within the industry, as well as a chance to discuss some of the themes and trends that we expect to develop over the course of 2019.

This year, I expect there to be heavy emphasis on technological innovation, especially with the ICE organisers having decided to focus on the "spirit of genius" as this year's theme. More specifically, I anticipate that there will be a lot of discussion around creative consumer engagement, and innovative ways of maintaining meaningful growth.

With that in mind, I believe that two key focal points for ICE 2019 will be the impact of streaming services (and possible stumbling blocks) and the continued convergence between esports and conventional sports, as well as how the industry can capitalise on these pre-existing communities.

STREAMING SERVICES AND DIFFERENTIATION

Research has shown that the average gamer now spends nearly two hours a week watching other people play video games online (including Twitch and Youtube Gaming). In South Korea and Japan, gamers now spend more time watching other people play video games than they do watching traditional sports, such as football or basketball.

This is testament to the enormous power that streaming companies are starting to wield, and attests to the fact that online gaming is taking an increasingly central role in many streaming services' propositions.

There is no shortage of premium content, and the industry continues to churn out an exceptional array of games and online platforms.

What will be interesting, and I for one am looking forward to exploring this issue at ICE, is how streaming platforms start to differentiate themselves from their competitors.

It is one thing being able to showcase brilliant content, but it is quite another ensuring that you are able to provide a unique, popular service. The likes of Twitch have already made a strong case for being a market benchmark, but 2019 is likely to see the emergence of a few more genuine competitors within the space. YouTube Gaming, Mixer and Steam TV are all innovative businesses that will be looking to strengthen their presence in the market, so a certain degree of individuality will be required to consistently attract respectable audience figures.

Many online platforms are still in their infancy, but it will be interesting to see how many existing propositions are built out. The end goal – and certainly the most exciting avenue – must undoubtedly be an array of streaming options that rival existing entertainment platforms, for example, eGaming's Netflix equivalent.

“ACCORDING TO A 2018 NEWZOO REPORT, GLOBAL ESPORTS REVENUES WERE UP MORE THAN 38 PER CENT ON 2017, WITH ESTIMATES SUGGESTING THAT THE ESPORTS INDUSTRY REMAINS ON TRACK TO REACH A GLOBAL VALUE OF \$1.4BN BY 2020”

THE DIRECTION OF TRAVEL FOR ESPORTS

According to a 2018 Newzoo report, global esports revenues were up more than 38 per cent on 2017, with estimates suggesting that the esports industry remains on track to reach a global value of \$1.4bn by 2020.

The question, therefore, isn't can esports continue to grow?

But, rather, what direction do we see the sector going in?

I personally believe that there will be increased convergence between the digital world and traditional sporting arenas. The NHL gaming championship, which took place at the Esports Arena Las Vegas in 2018, and this year's ePremier League FIFA competition, are excellent examples of how esports can continue to build their branding in communities that already exist.

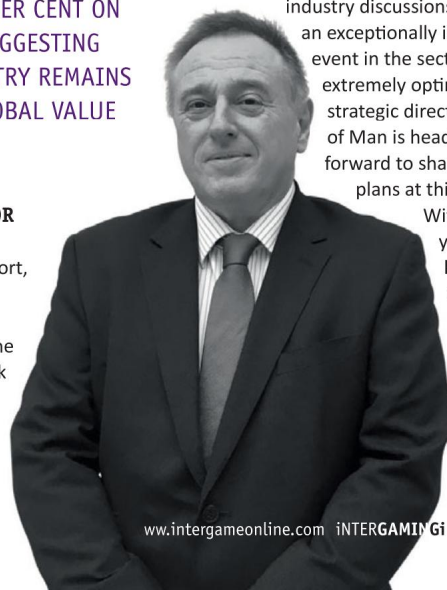
Particularly with sports that have an existing fan base, there is also an opportunity here to tap into the tribalism that already exists. There is opportunity for companies to move into markets that already have consumers who are willing to participate in the gaming industry – in this instance fans – and so the potential to build on these foundations is certainly worth exploring.

EXPECTING THE UNEXPECTED

If last year's event is anything to go by, then 2019 already carries lofty expectations for the eGaming industry. There are undoubtedly several trends that will continue, but as always, the excitement lies in the breakthroughs that no one is expecting.

ICE continues to play a vital role in shaping industry discussions, and it remains an exceptionally important event in the sector's year. I am extremely optimistic about the strategic direction that the Isle of Man is heading in, and I look forward to sharing some of our plans at this year's expo.

With that in mind, if you would like to hear more about what we have in store, do come and find us on stand number N6-220, I'd love the opportunity to speak to you.





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Talking Brexit

Matt Harrod, vice president of Europe at Processing.com, looks at the implications of Brexit in the igaming sector from a payments perspective



THE igaming industry has undergone significant changes over the past couple of years, from European regulation to PSD2 affecting payments and banking to then having GDPR to deal with just weeks before the World Cup in Russia.

But with the United Kingdom's departure from the EU imminent, and the pound continuing to fluctuate amid the ongoing uncertainty, will 2019 be equally as tumultuous for the igaming sector? And what will the main drivers for change be over the next 12 months?

BREXIT WON'T IMMEDIATELY AFFECT REGULATION

The UK, like many other European countries, regulates igaming domestically, meaning it will be free from the regulatory negotiations many other sectors are facing with Brexit. However, as the country looks inward with regulations,

the gaming industry could find itself subject to challenges associated with the various Brexit options.

OUR FUTURE ECONOMIC RELATIONSHIP WITH THE EU COULD POSE CHALLENGES

If there is a no-deal Brexit, Britain will no longer be part of the European Economic Area (EEA), which means Visa and Mastercard may charge extra for interchange fees. This would obviously have a huge impact on the igaming sector, especially if fees double to an amount similar to those in Norway and Switzerland. A negotiated deal would likely see a transition period in which fee increases would not apply, but there is the possibility they could apply after.

PAYMENTS WILL GO FROM PULL TO PUSH

Over the past five years, the payments industry has been making payments easier with the likes

of one-click payments and instant payments. However, we have started to see push back on this, particularly in the gaming sector, where banks are increasingly offering services that help people block or limit their spending. People will want to know when they are spending too much, and the norm may well change from pull payments to push payments.

WHAT'S NEXT?

There's set to be more political and economic upheaval in 2019, not to mention drastic shifts in consumer attitudes and behaviours. To navigate these fluctuations and remain competitive, igaming businesses must keep up-to-date with the latest changes in the sector and be prepared to act quickly. With another 12 months of change on the horizon, the future belongs to the companies able to change the quickest.



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HEADLINES

GREENTUBE, the Novomatic Interactive division, has announced a new partnership with game-tech company Stoiximan in Greece.

A premium selection of market-leading slot games, all seamlessly integrated via the Greentube NRGS platform, is now available for players with Stoiximan in the Greek market.

Stoiximan's product depth and quality of services have heavily contributed to the brand's success, working in sync with a company passion for product enhancement and innovation, both in sportsbook and casino offerings.

In addition to classic Novomatic slots such as Lucky Lady's Charm deluxe and Sizzling Hot deluxe, the game offering also includes popular new titles like Apollo God of the Sun and Book of Ra Magic, as well as many others.

MICROGAMING has celebrated the 15th anniversary of its partnership with Square Enix for the Lara Croft brand by producing a third branded online slot.

The exclusive agreement builds on the industry's longest-running branded relationship, which began when Microgaming launched Lara Croft: Tomb Raider in 2004.

Following the success of that initial collaboration, Microgaming developed a sequel in 2008, Tomb Raider: Secret of the Sword, which sent players on an escapade to track down fragments of a legendary sword.

Marked for release this year, the new game will once again feature the fearless heroine, ready to lead players on a new quest unearthing ancient trails and rewarding discoveries. The branded slot is being developed by Triple Edge Studios, an independent studio providing content exclusively for Microgaming.

Fans of the iconic adventurer can look forward to a whole new Lara Croft quest, as the latest title is set to join Microgaming's portfolio of branded content in the new year.

GAMING Innovation Group has signed a long-term contract with MegaLotto for the provision of its technical platform services and casino games, entering the lottery betting vertical in the process.

MegaLotto is a new startup initiated and backed by Optimizer Invest and will provide lottery betting services to allow users to bet on the outcome of the largest lotteries in the world.

GiG will support MegaLotto in its strategy of offering betting on multi-country lotteries and casino games to its end users in various markets. Launch is planned for mid-2019 and hence, is expected to have limited impact on GiG's revenues in 2019, with an increase from there onwards.

Ben Clemes, CCO at GiG, said: "I am delighted to add further growth potential for GiG by entering the Lottery vertical with MegaLotto. We share the same ambitions of a fun, fair, responsible and innovative user experience. GiG covers all verticals in igaming, by adding lottery to our games vertical, we are strengthening our competitive advantage as a global full service provider."

SPORTS betting and gaming technology supplier SBTech has appointed former Scientific Games CEO Gavin Isaacs as its new non-executive chairman.

Isaacs aims to use his 20 years' gaming experience across a series of senior management positions to further grow the company's rapidly expanding US presence.

Since the market opened in mid-2018, SBTech has completed and gone live with several partnership agreements with leading casinos in regulated states including New Jersey and Mississippi.

He spent the last four years as CEO and board member of Scientific Games and was responsible for championing game-changing mergers and acquisitions and growing the global lottery and gaming supplier from \$1.3bn to \$2.9 bn revenues in two years.



Catena Media has announced that Malta-based Optimizer no longer holds any shares or voting rights in the company.

SWEDISH slots specialist Quickspin, a Playtech Group company, has announced the launch of its latest loyalty tool, Quickspin Challenges.

Designed as a customer retention tool available to operators, the tool enables an additional level of gameplay for players on top of Quickspin's existing titles.

Challenges in essence is a mini-game displayed on top of each slot, with the extra level of gameplay fuelled by the outcome of spins from the game below.

The player's aim is to guide an in-play character through a maze to a final prize, allowing participants to unlock prizes as the path through the maze is generated – even if they might not hit that final big win.

CASINO game and software supplier Red Tiger Gaming has signed an igaming content distribution agreement with EveryMatrix's CasinoEngine.

The partnership will now allow more operators to access Red Tiger's extensive portfolio of slot and table games, including recent releases like Dragon's Fire and Jack in a Pot.

It will give the game supplier extra access to regulated markets around the world, including jurisdictions such as the UK and Denmark.

Chris Looney, commercial director at Red Tiger Gaming, said: "Teaming up with EveryMatrix will allow us to distribute our games to even more operators and players. I'm sure the deal will be very fruitful for both companies in the months and years to come."

BETCONSTRUCT has announced a new partnership with igaming design studio CasinoDesignPro.

In cooperation with BetConstruct, CasionDesignPro has designed two new slot games on BetConstruct SlotBuilder – the easy and quick way to create a game without the need for a basic knowledge of coding. These two games have been added to BetConstruct's gaming library.

Edgar Mkrtchyan, gaming group product manager of BetConstruct, said: "Thanks to CasinoDesignPro we have added two new high quality HTML5 slots to BetConstruct's wide gaming portfolio."

"Both Mystical Amber and Midsummer Magical Night are developed CasinoDesignPro professionals using BetConstruct's SlotBuilder."

HIGH 5 Games has rung in the New Year by releasing its portfolio of HTML5 igaming titles for Sweden through NYX/SciGames Digital.

Multiple real-money operators launched 15 games on January 1 with a total library of 40 to follow.

Many of these titles are already well known to the Swedish market through land and digital platforms. They include games tailored to Sweden with specific game and theme styles and include Valkyrie Queen, Joker's Riches and Silver Enchantress.

Since August 2018, High 5 Games has been delivering a consistent stream of Vegas-style games to multiple real-money operators High 5 Vault now offers High 5 Games' slot game content to more players in more places than ever before. High 5 Games continues to develop opportunities and to work with governing bodies throughout Europe and the US to expand its presence in 2019, including Pennsylvania, Denmark, Spain and Italy.

SLOTS maker Wazdan has announced a new partnership with TGP Asia that takes it into the Asian markets, ramping up its presence across the Far East.



The Gaming Platform (TGP) concept has evolved over years of running B2C gaming websites, with the recognition that the right partnerships are the key to success. The focus is on developing quality partnerships with operators, suppliers and content providers in order to deliver a flexible and dynamic online gaming platform for business partners. TGP Asia is the specialist Asia unit of TGP.

Wazdan has been racking up the awards for their innovative slots, winning Hot Product Award at G2E Asia with 9 Lions, which made a stir and got the company noticed in the Far East. In November at SiGMA, the company launched two new features: Ultra Lite Mode and Ultra Fast Mode, to generate added excitement and fun for players.



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A large, stylized graphic for the BOSS. logo. The word "BOSS." is in white, bold, sans-serif font inside a black rectangular box. The box is surrounded by dynamic, flowing blue and purple liquid-like shapes. There are also several 3D-rendered casino items: a roulette wheel, two dice, and a few small balls, all in blue and purple tones, scattered around the central logo.

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STAKELOGIC is taking players on a mystical and mythical Egyptian-themed adventure in its latest blockbuster slot release, Book of Cleopatra.

Players must search for the book which holds the key to riches beyond their wildest dreams. The book points the way to Cleopatra's palace, which is filled with ancient-Egyptian artefacts. Once inside the palace, players can unlock a treasure trove of prizes and big wins.

The game offers several features to help players on their quest to discover the book; in the Book of Cleopatra, the Wild symbol will award Scatter prizes and Free Spins.

There are also special expanding symbols on the Free Spins reels and players have the option to Buy Free Spins instead of waiting for the bonus feature to be triggered randomly. The Book of Cleopatra also offers an exciting Free Spins Gamble feature that allows players to wager five Free Spins at a time with a 50/50 bet. Players can cash out their Free Spins balance at any time during the game, so long as it does not drop to or below zero.



BLUEPRINT Gaming, in partnership with Warner Bros Consumer Products, has unveiled its latest video slot, Mars Attacks!, inspired by the 1996 classic sci-fi film.

As well as engaging reel spins, Mars Attacks! features five out-of-this-world progressive bonus rounds which build up to the final stand, while the game also contains an Alien Invasion Gamble enabling players to upgrade the feature and Martian Modifiers, which offer 3125 pay ways.

Mars Attacks! is the latest Blueprint game to contain the Jackpot King Deluxe progressive jackpot system. The advancement of the Jackpot King multi-game system features two "must be won by" pots that guarantee a fixed value payout.

The 5x3 slot is the fourth title released in partnership with Warner Bros Consumer Products, following Top Cat, Thundercats and most recently The Goonies, which has been Blueprint's most successful game launch ever.



MICROGAMING has released Book of Oz, the latest slot developed by independent studio Triple Edge Studios.

Book of Oz is a five-reel, 10-payline, high-volatility online slot. Brimming with fantasy, magic and adventure, the game welcomes



GREENTUBE is inviting players to get to know one of the most good-natured animals on the planet in its new title, Asian Fortunes.

A lovable, friendly panda is the player's new best friend in this new online title, which is already present in land-based casinos around the world. An allpay slot addition to the Greentube portfolio, it is now available to all B2B partners.

There are four lovely pandas waiting to give out winnings, and with cool extra features like Free Games and varying jackpots to win. The aim of Asian Fortunes is to line up five identical symbols from left to right. This slot does not have standard win lines and the position of symbols on the reels is irrelevant in this game. Instead, all combinations with a minimum of three matching symbols starting from the left-most reel pay out.

There are two Wild symbols in Asian Fortunes. The Blue Wild symbol appears on

reels two and four and substitutes for all other symbols except the Red Wild. The Red Wild symbol appears on reel three and doubles all wins when substituting symbols to form winning combinations.

Each time a Wild lands on a reel, a mystical coin is added to the bonus chest. Randomly, the chest will explode to award the Lucky Panda mini game. During this game, 12 gongs are presented with a guaranteed chance of winning one of four jackpots.

Behind each gong, one of the four Lucky Pandas is hiding and you must select the gongs until three identical Lucky Pandas are revealed to pay the corresponding jackpot prize. Ten Free Games can be won if three, four or five scattered Gong symbols appear anywhere on the reels from left to right. During this feature, normal symbols like A, K, Q, J, 10 and 9 are removed from the reels to increase the chances of a bigger win.

players into a world filled with enchanted riches.

Featuring Wilds, Scatters, Free Spins and Re-Spins, the fantasy themed slot encompasses whimsical art and captivating symbols, such as the lion of courage, the potion of love, the mystical wizard and the golden book, which are displayed on the reels to leave players spellbound as they spin to win magnificent rewards.

The Wizard's Book acts as both a scatter and a wild, which can result in powerful wins. Three or more Book Scatter Symbols trigger 10, 12 or 25 free spins, providing players with the opportunity for more frequent feature triggers. High-paying expanding and illuminating symbols can potentially trigger wins of up to 5,000 times the initial bet in free spins.

The game's Re-spin feature adds an element of thrill and excitement to the base game. After an initial wager, the player can pay to respin a single reel independently at an additional variable cost; for example, after a winning spin of four-of-a-kind Wizard symbols, the player can pay to spin the fifth reel to try to get five of a kind. Players can develop their own strategy within

the base game after every result, including the opportunity to land more Wizard's Book symbols to uncover the enchanted story within free spins.

BETSOFT Gaming is taking to the tundra with two unusual companions in Yak, Yeti and Roll in its new, seasonal, cascading slot game.

Set in the Arctic circle, Yak, Yeti and Roll invites players to join an Inuit inventor, known for his wild creations. Together with his long-suffering Yeti sidekick, they set out to traverse the wintry wastes in a very unusual vehicle. Foregoing traditional reindeer-pulled sleighs, the Eskimo Yak has built an ornate sled to steer through the snow. With a massive spiked wheel in front, his Yeti pal propels them forward by sheer pedal power.

Built around Betsoft's proprietary Trail system, Yak, Yeti and Roll was designed to create a sustainably compelling player journey. As the party crosses the ice fields, a constant trail of green, yellow, and white gems move across the bottom of the screen, advancing with each cascade of symbols that enter the reels.



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As the spiked wheel of the sled rolls over a gem, it is crushed into the snow and the player earns a prize from a pool containing instant cash, cumulative cascade multipliers, and free spins – with a maximum win of 200x their total bet.

Like all recent Betsoft games, Yak, Yeti and Roll was built in the company's cross-platform Shift development environment, which guarantees that the same gameplay reaches players on whatever device they choose.

CASINO content developer Realistic Games is offering players the chance to explore the enchanted forest with its new slot, Spin Dizzy.

Filled with woodland magic including toadstools, pots of gold and four-leaf clovers, the game promises to keep players spellbound with its mysterious features. Look out for the fairy, who can deliver either the Spinning Wild or the Spinning Symbol feature on any single game, ensuring there is always something to captivate the player's imagination.

Spin Dizzy also features a Free Spins bonus round triggered by three or four Scatter symbols. The player will win either a wild symbol or a free spin on each of the 15 reel positions. There are multiple wilds aplenty too, which can stay in place for every spin. Each wild symbol can also have a multiplier added to it making those wins even bigger. Once the free spins are over, the fairy can appear and start the feature for you again and again.

QUICKSPIN brings Russian folklore to life with Ivan and the Immortal King

Swedish slots specialist Quickspin, a Playtech Group company, takes players back into the enchanted past of ancient Russian folklore with Ivan and the Immortal King.

Designed by a team inspired by some of the most magical characters of Russian folktales, this immersive, action-packed epic is centred around the everlasting hero Ivan Tsarevitch, and his legendary quest to slay the evil King Koschey and rescue Maria Morevna, the Warrior Princess, imprisoned in his mountain lair.

With a treasure trove of free spins, multipliers and bonus scatter symbols to be unlocked, the hero's final showdown awaits when the players reach the evil King's lair, guarded by a fierce three-headed dragon.

GAME development studio Evoplay Entertainment has released its latest game: E.T. Lost Socks.

This 3x5 slot, featuring alien characters, has been designed to be both fast loading and light on mobile data use, making it ideal for lower internet speeds in emerging markets.

The game has 21 paylines and four different bonus free spin modes. Featuring substituting wilds, the violet alien symbol activates free spins with a shifting wild, while the green alien bonus produces expanding wilds.

The third bonus mode contains a blue alien symbol that sees high paying symbols replaced by wilds, and the red alien bonus feature activates a classic sticky wild.



YGGDRASIL has unveiled its newest white label adventure video slot, Time Travel Tigers, designed exclusively for GVC customers.

The multi-brand operator will add the innovative five-reel, 25 payline slot to its portfolio of best-performing games later this month ahead of the busiest time of the year for gaming.

The original title introduces players to Dr Tigerstein, a scientific genius who has invented a time machine that takes customers on a series of unique journeys. Players will be transported to the Prehistoric era, Ancient Egypt, Medieval Europe, and even the far

future in one of the game's dynamic free spins modes.

Each time period features a different selection of free spins, win multipliers and wild patterns, with guaranteed wilds on every spin. Time Travel Tigers also features engaging visual and audio settings, that regularly adapt as players travel through time to different places, constantly changing the feel and emotion of the game.

Yggdrasil has a successful history of designing and delivering exclusive white label slot games for some of the industry's biggest brands including LeoVegas and Betsson.



EGT Interactive has kicked off 2019 with a pair of new slots: 20 Joker Reels and Virtual Roulette.

20 Joker Reels is a five-reel, 20 fixed paylines video slot that has a classical theme, containing fruit and vivid graphics. The Joker symbol is Wild and substitutes for all symbols except for scatters, while Pouch is a Scatter symbol and appears on all reels.

A four-level Mystery Jackpot features, too, on a title available on desktop and mobile.

In Virtual Roulette, the third game in EGT Interactive's table games portfolio, there is the feeling of live streaming roulette but with the video slot experience.

Its user-friendly interface is easy to handle and sector and neighbours betting, re-bet, double and re-double functionalities are main features.

A four-level Mystery Jackpot cards features in a game that's available on desktop.

SHE was the first, and last, Empress of China in its 5,000-year history and the only woman to wear the yellow robe of the Emperor.

She changed China, 1,300 years ago, in ways that still resonate today – and now, RTG Asia's new slot Wu Zetian allows players to enjoy the prosperity of the ancient Tang dynasty for themselves.

While she relentlessly grew the Tang dynasty in every dimension – size, power, economy – Wu Zetian also built a government based on meritocracy, allowing commoners and gentry to take the imperial examinations to get into government service.

RTG has immortalised this compelling, beautiful, powerful but ruthless and dangerous woman in a new game that is highly volatile, as the empress herself was. Players can rise to power, as she did, with a maximum pay out of 50,000 times your bet per line across the 25 lines of this five reel game. And, thankfully, they don't have to assassinate anyone to win.



Portrait artists

Matthew Rochman, head of technology at OneTouch, explains why a simple approach to mobile-first gambling need not be a negative one

WITH a major focus on Asia and mobile gaming, OneTouch has devoted a lot of time, effort and resources into discovering the key to creating slots content that resonates within the market.

After all, with the market share of mobile consistently growing year-on-year, never before has it been more important to cater for the needs and wants of players, or risk losing them to a rival competitor.

It's important to remember that mobile is not just a one-size-fits-all solution. What works in one market won't necessarily work in another and that's something OneTouch has learned quickly.

The European market is very focused on gamification and getting the most out of every single pixel, which isn't easy on the smaller real estate of a mobile screen despite the addition of HTML5.

However, Asia is different. Players in the market don't crave "overly produced" games.

Asia is a simplicity market where bettors tend to prefer classic formats with a modern twist.

This is one of the reasons OneTouch has invested so much time and resource into perfecting the art of portrait mode slots, which not only make the most of mobile, but also retain a simpler yet engaging format.

The supplier places a lot of its focus on creating games that can be played in the palm of a players' hand, while also ensuring the necessary features, and high-end graphics are retained.

And with Puzzle & Dragons, Monster Strike and Rune Story all among the top grossing non-betting games in Asia played in this mode, it's safe to say that targeting this market is an easy decision to make.

Take the latest OneTouch release Juicy7 for example. This simple-to-play 3x3 game features true portrait-first design, while the retro music, sounds and icons combine to create a timeless classic.

Its clean and effective layout means players can treat it as a true on-the-go mobile offering, allowing them to change their stake or even add auto-play all with the use of just one hand.

Closer to home, we have all seen the portrait-mode gaming boom across social games. For example, Candy Crush Saga, which took the western world by storm and topped \$1bn in revenue.

These are the kinds of figures that should have the whole gambling industry sitting up and taking note, especially as the game play is relatively simple, offering nothing we haven't seen before.

With a JavaScript framework, portrait-mode mobile offerings need not be overly complicated, but they can still feature the latest in high-end graphics, exciting maths models and engaging gameplay.

Simplicity need not be a negative when the slot on offer is so convenient.

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Slotting into position

Greentube is set to unveil its latest stand-out slots and interactive solutions at ICE London 2019

On a dedicated area of the Novomatic stand at ICE London 2019, Greentube will let attendees step inside the “home of games” by showcasing its strength in the interactive gaming space, complete with new slot titles and the latest gaming solutions.

Greentube, the Novomatic Interactive division, is excited to unveil new slot titles at ICE 2019 including the highlight launch of The Great Gambini's Night Magic that aims to amaze players with a spectacular array of magic and illusions. Four magical features, stunning animations and excellent winning chances will see players jump into the spectacular world of a magician. On Wednesday, February 6, Stand S6-340 will even play host to some live tricks.

“We look forward to presenting a new selection of interactive content and solutions at ICE 2019 aimed at bolstering player and operator experiences, with the launch of standout games from our in-house and third party studios, and games based on popular titles from the Novomatic library,” said Thomas Graf, Greentube's CEO.

“THE MOMENTUM BUILT OVER LAST YEAR CONTINUES FOR GREENTUBE INTO 2019 WITH NEW OPPORTUNITIES SUCH AS MARKET OPENINGS IN SWEDEN, THE NETHERLANDS, SWITZERLAND AND SLOVAKIA, AS WELL AS IN NORTH AND SOUTH AMERICA”

“The momentum built over last year continues for Greentube into 2019 with new opportunities such as market openings in Sweden, the Netherlands, Switzerland and Slovakia, as well as in North and South America.”

The first of two online slot titles based on the IP theme MacGyver will make its premiere. MacGyver: Duct Tape & Diamonds takes players on an action-packed adventure with Richard Dean Anderson and lead cast, as the classic TV show of the 1980s is relived in casinos.

Another slot launch will see players journey to the depths of the ocean in Tidal Riches, where hidden treasures are waiting to be discovered.

Based on the Novomatic land-based link, the online version of Enchanted Fortunes Linked Jackpot also makes its debut appearance, launching with linked themes popular in the land-based sector such as Book of Ra Mystic Fortunes, Pyramid Fortunes and Goddess Rising.

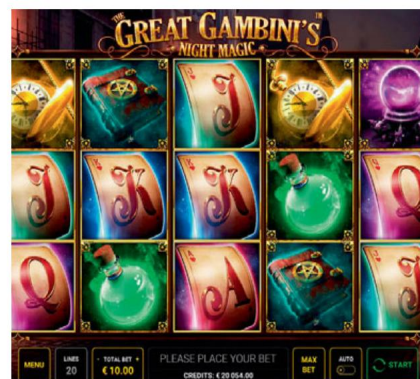
In addition, a full selection of classic, new and proven games from Novomatic, Greentube and third-party studios for the regulated markets will be presented to operators.

The innovative Greentube solution Plurius will present seamless gameplay and single wallet capabilities between land-based, online and mobile, demonstrating how players can switch between devices on the fly.

The system will present a wide selection of games, with titles like The Great Gambini's Night Magic and Apollo God of the Sun, on desktop and mobile, and leading Novomatic gaming terminals. Furthermore, Plurius will be connected to the Novomatic Biometrics System and showcase a new multi-level jackpot.

AbZorba Games will present a new Roulette game for the VLT market, exclusively via Plurius, as well as Grand Blackjack, as part of the latest suite of casino games simulating a live dealer game experience.

Eurocoin Interactive will release a wide selection of AWP, VLT, classic slots and bingo titles for interactive markets. The highlight launches will include Fluffy Bingo, a new addition to its Novo Bingo line of interactive bingo titles, Jackpot Dice, a title that features three creative jackpots, and an online version of the best-selling Swiss AWP machine Admiral Quattro.



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- Working closely with UK technical departments, third party developers and ADP Gauselmann GmbH technical, design and IT teams to deliver all projects on time and within set budget
- Research and product development
- Ongoing improvements
- Management of projects
- Regular travel within the UK and abroad

Required skills and knowledge:

- Good technical background
- Understanding of IT and mechanical design
- In depth knowledge of UK gaming industry
- Strong interpersonal skills and team management experience
- Experience in gaming industry is essential

Company offers competitive salary and attractive benefits package

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The art of creating games

Stakelogic CEO **Stephan van den Oetelaar** considers the philosophy behind the Dutch company's development of localised, boutique slots

In its five-year existence, Stakelogic has created a portfolio of online casino games that excel in wagering and player retention.

Stakelogic games reside at the top of some of the biggest online casinos in Europe. What does it take to be different and successful in a market that is flooded with new online games?

To build a successful game, every element of the game needs to meet the expectations of both the player and the casino. Stakelogic aims to exceed the expectations of both.

EXCEEDING EXPECTATIONS

Creating top games is art. Players need to be surprised, time and again. The animations, the sounds and the game logic need to be balanced in a way that it creates a feeling of sensation that attracts and retains players. Combining "old school" slot machine principles with the limitless possibilities of online technology. It is the world of Stakelogic and what the company does best.

Players are not homogeneous and preferences differ from region to region. The online gaming industry recognises this and is transforming itself rapidly towards player segments. Stakelogic has proved to be very successful in developing games that meet regional preferences.

THE UK MARKET

At ICE London 2019, Stakelogic will present its newest games for the UK market. The unique partnership between Stakelogic and Reflex Gaming has resulted in a series of spectacular games, including online versions of famous titles as Lucky Gems and Wild Moon, whereby the company has innovated by creating Quattro versions of the games.

The Stakelogic Quattro games enable play on one, two, three or four instances of the same game at the same time. As all instances of the game are perceived as separate games by the casino, the maximum stake per spin counts per instance of the game.

The Quattro functionality will lead to higher wagering for the casino, as players can decide to play several games simultaneously, multiplying the stake per spin. It resembles the experience of playing several slot machines at the same time in an arcade.



To further resemble the arcade experience, Stakelogic has enriched its games with (pooled) jackpots and gamble features.

And at ICE London this year, Stakelogic will introduce new "classic" fruit machines – online casino games which by reputation will become evergreens in Western Europe. The company will also reveal its newest dice games.

In addition to its portfolio of games, Stakelogic provides clients with advanced management information. Performance can be monitored online, in real-time, per game, per casino, per time interval, etc. The management information is fully user definable, based on parameters.

FUTURE PLANS

Stakelogic will maintain its growth strategy for the coming years in order to be able to fulfil the demand of our clients. Growing autonomously, the firm is extremely cautious where the underlying technology of its operation is concerned.

Its games are built within its own software development environment, applying its own development methodology, and the architecture and software components of its game servers are maintained with the utmost care.

Scalability and maintainability prevail above the rapid growth that can be achieved through the acquisition of colleague game development companies.

LEVELLING UP

If asked to put a label on Stakelogic – regardless of the respective growth phase – then "boutique game studio" is a perfect fit. It differentiates from what the company is not – a mainstream game developer, producing massive amounts of games with a short life cycle. That's a lot of handling for the developer and the casino, in exchange for a limited return.

Stakelogic games have gained a reputation of being both popular and commercially exploitable for a long time. The company is currently increasing its resources, while the time and effort invested in one game will stay exactly the same as the output is levelled-up.

Stakelogic aims to continue to surprise and enlighten its clients and players with new games and plans to add extra features with enriched player functionality. That means applying more advanced game logic, of which Quattro games are just an example. It's about games that will be embraced by players immediately, as they appeal to local preferences.

In the case that Stakelogic becomes a 250 staff company in a few years, the goal is to make sure the firm will still be seen as a "boutique game studio" by the market.

Strategic partnerships with aggregator platforms such as Relax Gaming and Leander Games have helped Stakelogic to grow faster than it could have alone and they have proven to be fantastic companies to work with. Stakelogic also offers direct integration services, as some casinos prefer to integrate directly.

In March of this year, the firm will open its sales office in Malta. Having a local sales organisation on the island will enable the company to develop and maintain relationships with clients and future clients better and more directly.

The online casino business is relatively young. In a very dynamic environment and a rapidly growing market, massive opportunities exist for all at ICE.

Stakelogic is an independent gaming company based in The Netherlands. Founded in 2014 and operating under a Maltese MGA B2B licence, all games are available in instant play format and are ready for integration in over 29 different languages. The games are also backed by integration support, a back office, reporting, dedicated client managers and 24/7 technical support.

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Slots: How the future shapes up

INTERGAMINGi talks to leading slots developers to gain an insight into current and future trends in a fiercely competitive vertical

ONLINE casino continues to evolve at a rapid rate. The way that players' play has changed – the UK Gambling Commission reported last year that over half of customers placed wagers on increasingly sophisticated mobile phones or tablets – and the increased spread and speed of wi-fi networks allowing high-quality iGaming experiences almost anywhere, high expectations are placed on suppliers to come up with slick, attractive and enthralling new solutions within a saturated marketplace.

Slots developers have not been slow to innovate to stay ahead, with gamification features increasingly prevalent, cascade titles and progressive jackpots proving popular and the likes of Betsoft's original title Max Quest: Wrath of Ra redrawing the boundaries of what can be achieved within a slot-game framework that incorporates social gaming elements without alienating the traditional player.

With the latest and greatest titles about to be unveiled at ICE London, we talk to some of the major players about their hopes and expectations for 2019.

INTERGAMINGi: What's new in online slots?

Maja Cvetkovic, business development manager online, adp Gauselmann: "Throughout 2018, the Gauselmann Group has further strengthened its focus on online gaming. For example, I've been hired as business development manager online in order to strengthen new business development efforts in this area and to drive the online gaming strategy forward.

"I am working closely together with the product teams within the group to develop and adjust the online games roadmap according to market needs.

"Of course, a key objective is to bring the successful land-based titles from the popular Merkur library to online and make them popular with online players as well. But we are also focusing on developing specific games for online gaming.

"As such, we are opening a new game design studio, Bee Cool Gaming at the beginning of 2019. This newly established studio will solely focus on the development of online games content and will complement our existing game design studios around the world."

Mathew Parker, creative director, Live 5 Gaming: "There's been a great deal of innovation in the online slots industry recently. There's a major influence coming across from mobile games –

one example of this are cascade games, which grew in popularity after games such as Bejeweled and Candy Crush became mainstream hits.

"Other innovation is coming from games which provide a 'twist' on a classic – taking a familiar concept and developing it further, creating a new way to deliver a great player experience."

Daniel Wright, game producer at Play'n Go:

"In the past year, we've seen subtle innovations really catch on and gain popularity. After the success of slots like Bonanza, among others, the market has been inundated with versions of the Megaways mechanic.

"Clearly, these have been popular in the past year or so and it will be interesting to see if the interest continues amidst an influx of similar titles.

"The grid slots that we have pioneered here at Play'n Go, are another example of an innovation that the market has truly embraced with the success of last year's Rise of Olympus and Sweet Alchemy building on the previous successes of Reactoonz and Viking Runecraft.

"Often, we see products that innovate a bit too much and are probably a bit too much of a challenge for players, but these examples have provided just the right amount of innovation and been particularly successful in the past year."

Andrea Boratto, CEO at WorldMatch:

"Nowadays, we have a macro trend which is the greater control of advertising in regulated countries. This increase in constraints means that the conversion of successful terrestrial products into the online is strategic.

"The main benefits are the time to market, quickly and with products that have already been shown to work. Above all, there is the need for recognisable products that need less communication. In this direction, the partnership with Octavian that will provide about 120 new titles from the land-based world."

Is there a trend towards players preferring high volatility games over those that pay out frequently but at lesser amounts?

Boratto: "We work across many continents and certainly we cannot talk about 'global' trends. Certainly, Asian markets show a preference for high volatility games. Spain and Latin America seem to prefer a more cautious approach by choosing games with low volatility that guarantee a longer duration of play.

"In Italy, where we have a strong market penetration, we note that operators that have a very strong terrestrial component prefer to

push games with high volatility, whereas those who work mainly online seem to prefer products that guarantee greater retention (and therefore lower volatility).

"In any case, in the mature markets the offer is fairly balanced, so as to be able to satisfy all the different categories of players."

Wright: "It might seem that way, as businesses can get blinded by the big wins or losses that high volatility games deliver.

"However, there is still a huge market for low volatility games. Operators and suppliers need to have a mixed suite of games and cater to all types of players. Otherwise they can become overly dependent on high volatility games and very one dimensional.

"Just look at some of the leading bingo sites for example and what their most popular slots are – clearly, we can see lower volatility games featuring prominently alongside high volatility games. It would be a mistake to neglect any group of players, particularly with regulations changing all the time."



“OPERATORS AND SUPPLIERS NEED TO HAVE A MIXED SUITE OF GAMES AND CATER TO ALL TYPES OF PLAYERS. OTHERWISE THEY CAN BECOME OVERLY DEPENDENT ON HIGH VOLATILITY GAMES AND VERY ONE DIMENSIONAL”

Daniel Wright, Play'n Go

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Parker: “With the increasing popularity of slots streamers and YouTube moments high volatility games are increasing in popularity as they can provide that truly exceptional YouTube experience – getting that right sequence of events that results in a potentially life changing win. However, there are players who will prefer lower volatility games.”

Cvetkovic: “Our experience has shown that players do like a challenge within a game but at the same time there is also need for nice and steady win amounts during a playing session. We do see regional differences with regards to volatility preferences – markets such as Germany and Eastern Europe tend to prefer higher volatility levels, while in markets such as the UK there’s a general preference for more entertainment-type games.”

How important is having high-end graphics, animation and sound within a slot?

Wright: “Playing a slot is about the whole experience, so it’s important that graphics, animation and sound are high quality and complement each other. The visuals and sound are particularly important for attracting players and giving that good first experience.”

“Even though it’s mainly the math model that keeps people coming back for more, both visuals and sound really help to deliver an immersive experience that will stick in people’s memories.”

“We have a game coming out soon, called Cash Vandal, which utilises the sound and visuals in a really interesting way. In this game, players train-hop between major cities. There is a music track running through the whole game that subtly adapts to reflect the city that the player is in at the time. This gives players that little something extra to enjoy and appreciate, on top of the great gameplay.”

“You have to be careful that slot music doesn’t become repetitive and irritating – the music in Cash Vandal I would quite happily listen to for pleasure.”

“Ultimately, the long-term performance of a game is greatly dependent on the math model – but the presentation, animation and sound are also crucial to the overall experience.”

ANDREA BORATTO, WORLDMATCH:

“I would say that you need to find the right balance to ensure the best gaming experience and a high responsiveness with speed of play. Patterns that are too simple may not attract younger players coming from social and gaming contexts.”



Cvetkovic: “High quality graphics and vibrant animations are very important for the overall player experience and are a key element in bringing the casino experience to online.”

“We’re utilising graphics and animation to tell a story that unfolds as players progress throughout the game. It is important, though, to put players in control and give them the opportunity to interrupt animations if they wish.”

Parker: “High-end graphics are extremely important to terms of user experience, game studio and the slot industry reputation. Slots will be comparable to mobile apps and AAA gaming titles so it’s imperative that high-end visuals and sounds are part of the production fabric.”

Boratto: “I would say that you need to find the right balance to ensure the best gaming experience and a high responsiveness with speed of play. Patterns that are too simple may not attract younger players coming from social and gaming contexts.”

“On the other hand, 3D animations similar to short films distract the player too much and make the user lose focus on the game, as well as weighting the loading and running speed of the game.”

How do you identify and follow trends in content and new features?

Cvetkovic: “We’re researching market developments in order to identify future trends that we implement into our roadmap. Furthermore, we are closely monitoring player preferences in various online markets and for different platforms.”

“To further strengthen our efforts in this area we are currently hiring a product marketing manager who will strongly focus on market developments.”

“Our newly established game design studio Bee Cool Gaming consists of young but experienced professionals gathered from all around the world who will bring in their gaming experience to develop games and features that are innovative and attract new players including millennials and Generation Z.”

“The Gauselmann Group has a wealth of experience in gaming operations in Germany and across Europe which places us in a unique position with regards to in-depth player understanding. We are working towards utilising this core competence even more than before for online gaming by developing targeted content according to different player types and preferences. In addition to that, we are also working together closely with our partners, listening to their feedback in order to further enhance our content and features.”

Is the player who simply wants to play classic slots in danger of being forgotten about?

Parker: “No, there will always be a place for classic slots players. They are one of many player profiles the gaming industry will always cater for.”

Boratto: “Of course there is the risk. The pursuit of the latest fashion, the last character in the hit

film or the latest Netflix series are likely to shift the focus from the ‘classic’ slot to a different concept of entertainment.”

“We have chosen to offer mainly high volatility games and themes that wink at high roller players on the Earth market. In many countries, land-based gaming accounts for over 90 per cent of the gambling market and the conversion of those players to online is a real gold mine.”

Wright: “Not at all, I think the market is in a really good place now for players of all persuasions and preferences. As I say, there are some interesting innovations around, but there is still a huge appreciation for more traditional slots.”

“Wolf Gold (by Pragmatic Play) recently won Best Slot Game award at the Malta Gaming Awards, which shows that in among all the innovation, it is a more traditional theme and mechanic that can come up trumps. Similarly, alongside the success of our more innovative games, there are classic games like Fire Joker and Mystery Joker which continuously perform well and remain popular with players.”

Cvetkovic: “Absolutely not! Classic slots have always been a key element and strength of our portfolio and this won’t change in the future. In general our games are targeting players who enjoy medium to high volatility levels.”

MAJA CVETKOVIC, ADP GAUSELMANN:

“Testing and analysis are very important for providing games and gaming solutions that resonate with player preferences and provide an enjoyable playing experience.”



How important is rigorous testing in creating a truly satisfying user experience?

Cvetkovic: “Testing and analysis are very important for providing games and gaming solutions that resonate with player preferences and provide an enjoyable playing experience.”

“This is not only important for the individual game but also for utilising the learnings from user testing and focus groups for future game development. It’s basically a never-ending process that allows us to continuously enhance game development and subsequently the player experience.”

Parker: “Highly important to the longevity of a game, if the user has a bad experience, they are more than likely not going to play it again.”

Wright: “Having produced many games I can see what a big difference the last five per



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Your Guide to the Gaming Industry

cent makes in development. When a game is technically shippable, it's that final bit of polish that lifts a game from a good experience to a great experience.

"This includes rigorously testing the game and ironing out all the little issues that will have even just a slight impact on the experience. With so many games on the market, slot players can quickly switch to a new game if there is something not quite right about the user experience, so it's important to spend the time perfecting it as much as possible.

"At Play'n Go, we rely on our experienced designers, testers and developers to create a great user experience, but also others in the wider business to play the nearly final product with fresh eyes, so we can see how players react to the game as a first experience.

"Aside from that, you do hear these horror stories of companies putting games out to market with the demo test commands still active – no one wants to be responsible for that kind of mistake, of course – so yes thorough testing is pretty crucial!"

Boratto: "It is paramount! The gaming experience is the element that makes the real difference. Fast, exciting and able to trigger adrenaline. Certainly, the quality of the assets is important but the magic mix that produces a successful game is an alchemy that is not easy to replicate.

Branded slots: how cost-effective can licensed games be in terms of acquisition?

Wright: "I think, as you say, these branded games can be effective for acquisition – lots of people want to take a look at the nostalgia brand slots.

"However, often the interest wanes quite quickly if the game itself isn't up to standard. You can see this reflected in the numbers, where branded games often peak higher than other games in the first week after launch, before quickly declining and dropping below most other games. There are some exceptions of course, but only where the mechanics and math behind the game are of good quality."

MATHEW PARKER, LIVE 5 GAMING:

"If the brand is popular it will be expensive to acquire but may reach a larger audience. If it proves to be popular enough and the game meets the standard of the brand it can end up being quite cost effective. Niche branded slots run a higher risk of missing the mark with players."



Parker: "It's a fine balance of cost and choice of brand. If the brand is popular it will be expensive to acquire but may reach a larger audience. If it proves to be popular enough and the game meets the standard of the brand it can end up being quite cost effective. Niche branded slots run a higher risk of missing the mark with players."

Boratto: "Personally, I think these games are not worth the effort. There are many examples on the market, including dozens of titles that refer to very famous music bands that have not had any kind of success on the market.

"Certainly it gives visibility to the manufacturer, but also does not guarantee any particular returns – not to mention that usually, they cost the operator much more and an increase the price in a very crowded market with very aggressive competitors is never a strategy that rewards particularly well."

Do you see a trend towards developing specific content for online or mobile only or rather for porting successful land-based titles?

Cvetkovic: "I'd say there's a mix of both. As mentioned before, we are focusing on developing specific games for online, both with our existing game design teams as well as establishing a dedicated game design team for online. On the other hand we are of course strongly benefitting from porting successful games from the popular Merkur land-based library.

"In addition to internally developed content we are also working with development partners in several areas. This enables us to offer a very diverse portfolio of content, particularly with the latest titles that are addressing various player segments."

How close are the ported games to the land-based original games?

Cvetkovic: "Experience has shown that the game system should not be changed when porting games from land-based to online as players have specific expectations for their favourite games with regards to volatility, bonuses and graphics.

"If we absolutely need to make changes to the games due to regulatory requirements, we try to stay as close as possible to the original land-based game. On the other hand, online gaming provides the opportunity to learn from the mostly younger online players and derive content strategies for the land-based area."

What are your plans for the upcoming ICE show and how will the offering differ from previous years?

Wright: "I think the last few years have seen the emergence of newer, high-quality game providers to really challenge those big names who have perhaps become a bit complacent. With several major technical and legal requirements now behind us, this year could be a big one for game providers.

"The arms race continues in terms of the quantity of slots that providers are putting out, but this means the quality is going to have to increase even further as everyone competes

for real estate. Therefore, I expect to see more products than ever, and higher quality products than ever. Play'n Go has a record number of games pencilled in for 2019, and our challenge is to make each game our best so far – the roadmap is really exciting!"

Boratto: "We do not want to look like conservatives, but we believe that consumers ultimately want something 'new but controlled'.

"As an example, with virtual reality and 3D we have already seen in home TVs that the consumer wants simple and direct things. Every complication is the enemy of fun and relaxation.

"Having said that, it is clear that the consumer is also used to great graphics and effects and therefore the games will surely be richer and more colourful.

"The mobile trend will continue, driven more and more by the migration of customers from desktops. What will remain important to mobile, moreover, is that with new phones have bigger and better screens, the interfaces optimisations become be increasingly vital.

"Trends such as the syncretism between skill and randomness clash with the regulations of the various jurisdictions that place clear and precise limits between skill and chance. WorldMatch, producing for the major jurisdictions, clearly produces games that comply with these regulations."

Parker: "There has been a lot great content in recent years, as there have been some serious new contenders joining the scene. We can expect to see a lot of the bigger players upping their own standard."

Cvetkovic: "We are very much looking forward to welcoming visitors to our booth at ICE London 2019.

"At the show, the Gauselmann Group will further underline its commitment to online gaming by presenting its online offering on a specific, dedicated booth. This booth will comprise Cashpoint sports betting solutions and edict eGaming online games and online gaming solutions.

"As part of its offering, edict will also present the latest Merkur games for online. In addition to that, Blueprint Gaming will also present its online games portfolio on the Gauselmann Group booth.

"One highlight of our ICE presentation will for sure be the launch of Zentaurus as an online game, one of the most successful games with operators in Europe and Latin America. Furthermore, we are of course presenting our entire portfolio of online games and online gaming solutions and will reveal further highlights at the show."

"I THINK THE LAST FEW YEARS HAVE SEEN THE EMERGENCE OF NEWER, HIGH-QUALITY GAME PROVIDERS TO REALLY CHALLENGE THOSE BIG NAMES WHO HAVE PERHAPS BECOME A BIT COMPLACENT"

Daniel Wright, Play'n Go

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Experimenting with innovations

Dmitriy Dubinin, project manager at AGames, explains how his team have incorporated social and betting elements within slots



TREND-SETTING

Since gaming – and slot development in particular – is a conservative industry, any innovations are often experimental for casino game providers.

In terms of trends, virtual reality looks really promising. This technology, though, hasn't yet reached the level when game providers can use it widely and it is mostly used as a demo at the moment.

Another trend is the use of elements of casual games in online slots. Developers include a simple story and plot within an online slot machine game and implement the character, which can be upgraded as a player goes through every level. The character can be both the player's avatar or the mediator between a player and a casino. Revealing the story and getting rewards for accomplishing quests motivates players to get back and play over and over again.

Another new element is connected to people's desire to share their progress and compete with others. This is social interaction and it already is a must for a modern online slot game. The option of inviting a friend, competing with each other online, and sharing a win on social media definitely makes any online casino engaging and intriguing.

At AGames, we enjoy experimenting with innovations. Recently this year we combined online slots with betting elements and got something amazing. In our World Cup Football Slot a player can choose a team before spinning the reels, check on that team's rate during the game and get wins on the basis of this data. The most exciting part is when respins are played and real football players lead the ball across the field to score a goal.

“YOUNGER AUDIENCES DON'T WANT OLD-SCHOOL SLOTS WITH POOR GRAPHICS AND PRIMITIVE GAMEPLAY. THEY NEED IT BRIGHT AND EARTH-SHAKING, WITH THE ABILITY TO SHARE ON SOCIAL MEDIA”

GRAPHICAL EXCELLENCE

Placing a strong emphasis on graphics and animation is another important trend. A young audience perceives the greater part of the world through pictures, and our mission is in providing young players with quality slot images.

Younger audiences don't want old-school slots with poor graphics and primitive gameplay. They need it bright and earth-shaking, with the ability to share on social media. In addition, more and



more of them play on mobiles and tablets, so slot developers should take care of good mobile graphics as well.

Our own example of a product with high-end graphics and animation is in the Stellar slot: shiny stones crush in deep dark space. However, in Stellar, we created bright symbols placed on an animated background that gives the player a sense of moving through an endless galactic skyscape. This is more than just spinning a reel – this is a whole new universe.

At the same time, classic slots remain extremely popular among an older audience, and many providers develop new slots following the example of their proven predecessors.

There are topics which have passed through years and never got old, such as Egypt-related slots. Just consider Book of Ra, which has remained a favourite among older generations of players for a decade.

There is, additionally, a trend for creating slots with classic game mechanics using new-age graphics. Following this trend, we developed an entirely classic slot with the use of the latest graphic technologies called The Money. We were delighted and somewhat surprised to discover that it became one of the most favourite games within the BOSS. platform.

THE RIGHT LEVEL OF VOLATILITY

This is a question at issue, as both game mechanics – high volatility and low volatility – have their audience. Risky players usually don't want to spend time on bits and pieces and prefer big but rare wins, while others value stability and enjoy small but frequent wins.

In this regard, I don't really think there will ever be an overwhelming trend one way or the other.



FEEDBACK LOOP

Players always expect to get an error-free product, so testing is a necessity to ensure a high-quality experience. It's important to run opened and closed playtests with real players while working on the product and the beta testing just before the release, in order to avoid negative feedback.

As we know from experience, user feedback on previously released slots is important as well. With these insights, slot developers can better understand what players enjoy the most and take this information into account when developing new slots. Popular mechanics can be applied again in new games providing great coverage for a project.

EXPECTATIONS FOR ICE

At ICE London, we expect to see the realisation of innovative technologies such as new slot mechanics virtual reality, graphics innovation, and social interaction in real casino products.

We will also be pleased to share our achievements in developing slots and hope our games will find their fans at the exhibition in London.

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Satisfying demand

Valli Fragoso, chief product officer at Pragmatic Solutions, describes how the platform provider has adapted to modern player requirements



FLEXIBILITY

The industry is evolving at a very fast pace, meaning a flexible platform provider such as Pragmatic Solutions looks to provide custom platform solutions and custom UI to support all technological needs of the operator. Other prominent features include real-time data availability and dynamic segmentation, features that Pragmatic Solutions has offered widely to our operators in 2018.

OPTIMISATION

It is proven that today, gaming companies compete based on customer experience. Though many try to provide the best experience, not everyone is able to satisfy their customers 100 per cent and therefore operators are doing their best to optimise.

Operators can focus on custom player

experience either through marketing tools, content, rewards and so forth. This has now become a highly important investment within the industry as it brings a good return of investment to the operator.

MOBILE UX

Our company has invested thoroughly in mobile UX. In fact, our slogan clearly states that we are a "mobile-focused gaming platform". To make it easy for a user, mobile UX should have simplified linear user flows, the ability to navigate with one hand to support portrait mode, customised content and user interfaces, and prioritised relevant information on the small real estate.

All this together provides the ideal experience for the user, which then translates to a successful solution for the operator.

ADVANCEMENTS

Player management is key to the online industry and in 2019. I would expect to see an increased introduction of AI in the gaming industry to promote customised content by demographics, and of course to improve target marketing.

Within casino and sportsbook, without hesitation I would say the biggest impact for us is being made by various bonus features, real-time data availability, dynamic segmentation and new operator onboarding.

THE CHALLENGE AHEAD

While we welcome the introduction of gambling regulations in an increasing number of jurisdictions, this will increase the time to go live in all these markets along with an increased cost to the operators and platform providers.

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Curing identity impatience

Yuval Ziv, CCO at SafeCharge, examines how the addition of a dose of automation can work to aid customer onboarding and authentication

THE gaming industry has evolved in leaps and bounds, with online gaming now responsible for generating a staggering 35 per cent of the industry's overall gross gambling yield.

While this has created a wealth of opportunities, it has also presented gaming operators with increasingly complex challenges, not only in the regulatory domain, but also in the speed at which customers are identified and successfully onboarded to the online service.

Even though online experiences cater for the demanding gamer wanting to play anytime and anywhere, onboarding to a new service is known to be a nuisance. The nature of the industry demands thorough identity validation checks such as date of birth, bans and sanctions, proof of residence and so on, which often translate into lengthy forms that can prove a stern test for anyone's patience.

With the online gaming community having the lowest tolerance for arduous identity checks – sitting at just four minutes – it is vital that operators achieve the perfect balance between protecting their business from fraud, whilst simultaneously providing a positive and seamless player experience.

More and more businesses are starting to understand the importance of the customer journey, with identity verification being the first key priority. However, most organisations are still trying to manually juggle multiple validation sources, contracts and regulations, often amounting to a mind-boggling quarter of the whole verification process. But what does this mean?

Simply put, with the growth of the online gaming market showing no signs of abating, those operators struggling to modernise their identity verification infrastructures will be at risk of losing potential customers, which will inevitably impact their bottom line due to customers migrating elsewhere.

INJECTING AUTOMATION INTO YOUR IDENTITY VERIFICATION PROCESSES

In order to overcome the barriers to a quick, effective identity verification procedure, SafeCharge is prescribing a new solution called Identity Manager. This is an innovative product that is designed to dramatically speed up identity verification processes while also decreasing manual and time-consuming identity checks.

Relying on SafeCharge's expertise of working within highly regulated markets, Identity Manager is an agnostic gateway that connects merchants to a wide range of background validation checks worldwide, in an automated fashion.

The solution enables gaming operators to cut through the complexities associated with different markets and regulatory requirements, allowing identity verification processes to become fast, intuitive and effortless for the customer. For those merchants willing to get back in control of their strategies, Identity Manager enables businesses to operate within the latest regulatory compliances, mitigate fraudulent activities and easily connect to various providers in every region across the world.

START EXPLORING NEW MARKETS SAFELY

For successful identity verification, operators need to collect vast amounts of personal information – including age and address – and process these quickly to alleviate a potential frustration on the customer side. Despite the variety of third-party providers available across the world to meet identity validation requirements, there is always a chance for one service to fail due to technical disruptions, leaving frustrated customers stuck in an authentication limbo.

SafeCharge enables businesses to use a single contract to obtain a worldwide authentication process. This not only helps operators to overcome this problem, but also keep operators' businesses safe, no matter which region they are in.

By customising verification parameters according to local regulations, Identity Manager's "smart routing" automatically connects operators to the optimal range of authentication vendors based on specific customer types and regions. If an authentication check fails to complete with one provider, verification automatically routes to an alternative supplier to complete the process. This also helps to streamline the onboarding experience and alleviate customer pain points.

Additionally, if suppliers fail to complete the eKYC process for any reason, customers are presented with a verification screen that allows them to upload their documents and get online verification, from a desktop or a mobile device, wherever the customer is.

Automating the verification process will help operators eliminate friction from the onboarding process and offer customers a remedy for identity impatience. More importantly, however, using an automated verification solution will also help operators expand into new markets in a more secure manner, supporting compliance in even the most tightly regulated of markets.

ADAPT FOR THE EVOLVING REGULATORY LANDSCAPE

The way businesses handle authentication has evolved over the years. In a sector as tightly regulated as the gaming industry, operators may scramble to keep up with every change or update to regulations, for instance General Data Protection Regulation (GDPR) and Anti-Money Laundering laws in the European Union.

Through Identity Manager's automation capabilities, operators can keep their reporting information up-to-date by the minute, allowing them to keep pace with the latest regulatory changes and operate with full compliance.

As new technology continues to reshape the gaming industry and regulatory landscape, operators must recognise that automation can streamline the complex verification process, satisfying both regulators and gamers by upholding stringent KYC reporting standards and a seamless onboarding experience.

With more operators understanding the importance of the customer experience journey, identity verification is a key priority. For operators looking to take control of their verification technology, automation provides a game-changing solution.



Paying it forward

The payments sector is a vital component of the igaming ecosystem and can have a major impact on customer retention. **Samuel Barrett**, director of gaming at Trustly, and **Stan Rubin**, COO and MLRO at Flexepin, talk through the latest innovations

CONVENIENCE, security and speed are paramount when it comes to payments.

Players have increasingly high expectations of a process that will be quick and hassle-free – naturally, with the trust that their details have been safely stored.

Payments service providers have to be able to adapt to regulatory changes in a fast-moving sector while providing a seamless, fully integrated experience that engenders customer loyalty.

It's no simple task but as Trustly and Flexepin relate to *INTERGAMINGi*, there's no shortage of expertise or forward-thinking within a sector that no igaming company can any longer afford to under-value.

“DURING THE PAST YEAR THERE HAVE BEEN MANY ADVANCES IN PAYMENT TECHNOLOGY, RESULTING IN BETTER SECURITY AND IMPROVEMENTS IN LOADING AND WITHDRAWAL OF FUNDS. HOWEVER, THE MOST IMPRESSIVE ADVANCE HAS ARGUABLY BEEN THE INCREASE IN THE VAST ARRAY OF PAYMENT OPTIONS”

Stan Rubin, Flexepin

INTERGAMINGi: How have advancements in payments technology had an impact on igaming over the past year?

Samuel Barrett, director of gaming at Trustly:

“In the past year, Pay N Play, our payment product that enables frictionless registration and deposits, has truly taken hold in the gaming industry.

“Players have come to expect the streamlined experience it affords, meaning that operators that don't integrate the product into their casinos and betting sites are quickly falling behind.

“We've also developed a way to integrate the Pay N Play technology directly into banners on affiliate sites, allowing operators to reach more players and increase conversion. It has quickly become a new standard that is changing the face of gaming as we know it.”

Stan Rubin, COO and MLRO at Flexepin:

“Historically the key focus for online gaming companies was betting software and the associated user experience and design, consequently, having quality payment services was undervalued. However, as the ever-increasing compliance requirements began to erode the customer experience, greater emphasis is being placed on all touch points with the customers, increasingly including the payment element.

“During the past year there have been many advances in payment technology, resulting in better security and improvements in loading and withdrawal of funds. However, the most impressive advance has arguably been the increase in the vast array of payment options. Operators can now effectively accommodate almost all customers' preferred payment methods, thereby increasing customer satisfaction and resulting in better retention rates.

“Online gambling has long carried the stigma of being associated with high risk transactions. Payment technology has already helped to combat this image. Furthermore, future developments in payments, including technologies using face recognition and biometric technology as well as the full integration of artificial intelligence, are

set to significantly decrease the scope for fraud associated with this sector. This should further reduce the stigma associated with the sector. What is certain is that the payment industry in the next few years is committed to delivering payment technology which will make a very meaningful contribution to enhancing the overall customer experience.”

What impact have AMLD4 and GDPR had on the payments sector?

Rubin: “The gaming sector has historically been better resourced and skilled than, perhaps, other online sectors to manage and cater to a rapidly changing regulatory landscape. This is because it has been forced to comply with an avalanche of new regulations and compliance requirements which have targeted this industry over the last few years.

“Operators had invested significantly in robust compliance systems and are in the habit of deploying best practice models, even if these are not required by law. It is, therefore, not surprising that the impact of the fourth AMLD and GDPR was far less traumatic on this sector than on other business sectors as the processes and procedures already deployed served as an excellent starting point for the implementation of these requirements.



"Nevertheless, notwithstanding the significant skill and systems inherent in this sector to manage regulatory changes, there is a distinct possibility of over-regulation in this sector. Over-regulation in any sector will always be responsible for a host of unintended consequences – often exacerbating the original problem or creating new problems that are more serious than the ones it was meant to correct. An example of this could be that due to the demanding regulatory requirements, customers could be pushed or prefer to do business with unregulated operators in the sector."

When, if ever, will cryptocurrencies be used as a payment method by the wider public for igaming?

Rubin: "Confidence to use cryptocurrencies will increase as more countries act to regulate this industry, which will lead to an improvement in the perceived image of the industry by the wider public."

"This, together with being better education about the risks and benefits associated with these currencies, will invariably lead to more people having the confidence to use them. When this materialises, the gaming industry will, unsurprisingly, be ready to fully embrace cryptocurrencies as the gaming sector has been the leader in adopting new payment options."

"The gaming operators have fully internalised that in order to attract and retain customers in this highly competitive industry, and need to offer as many payment options as practical in order to cater for a broad range of customer preferences."

"In summary, there will be a direct correlation between the increasing use of cryptocurrencies as a mainstream payment method and gaming companies adopting this as an additional payment method."

Barrett: "Cryptocurrencies and blockchain are topics constantly bandied about, and for a good reason: when you think about the potential cryptocurrencies have to impact the igaming industry, it's pretty cool. Deposits and withdrawals could move faster than ever because everything is done on blockchain and money moves outside the banking rails. It has been a natural progression to cryptocurrencies and soon the Malta Gaming Association will even begin to regulate and facilitate them."

"With that said, we need to be realistic. Cryptocurrencies are still in very young stages of development and it will take a lot to reach a mass scale adoption. They have great potential to change the way we play games, but I'm not sure we will get there any time soon."

What are the opportunities for payments providers within the US?

Barrett: "The US is a very fragmented market and each state requires a local licence, which makes it a difficult market to enter. However, it poses a great opportunity for payment providers and other suppliers, so we are monitoring the regulatory situation closely."

"Trustly already works with most of the operators in the European online gaming market,

and those operators are expanding into the US by partnering with land-based casinos. So for Trustly to enter the US, all we have to do is develop a compelling product and deliver it to our existing customer base."

"Expansion outside of Europe is in our long-term plan and we foresee huge potential not only in Europe, but also globally. So while we are certainly considering expansion to the US market, we are simultaneously analysing other markets for product fit as well."

How are compliance costs driving M&A and what other factors are involved?

Rubin: "There has been a strong drive towards consolidation in the gaming industry in recent years. As envisaged, the increasing number of new directives and regulations has and will continue to mean that the compliance costs will increase, which has undoubtedly been one of the contributors to this consolidation."

"However, the underlying cause of the drive towards consolidation is the highly competitive environment, making it increasingly challenging and expensive for operators to grow market share. This means that operators are forced to look at other means to address the spiralling operating costs, to which the increasing burden of compliance costs is a significant contributor."

"Inherent in many businesses are operating expertise, systems and capacity which can cost-effectively absorb increased volume, making acquisitions an attractive and highly lucrative proposition to help absorb the increasing cost base."

"Operators are, therefore, aggressively searching for acquisition opportunities in their existing markets and/or new geographical markets. Furthermore, as these opportunities became more difficult to find, attention will focus on acquiring businesses complementary to their core operations. Both of these sorts of acquisition create new revenues and cost-saving opportunities and, consequently, M&A activity in this sector is unlikely to slow down."

What are your company's plans for ICE London and beyond in 2019?

Rubin: "Flexe Payments is a UK-based company which is a wholly-owned subsidiary of the Novatti Group which is quoted on the Australian Stock Exchange."

"Consistent with Novatti's aim of continuing commitment to delivering innovative payment solutions, Flexe Payments identifies global market niches where the Flexepin e-money voucher can be deployed to assist both the consumer and merchants to make and accept internet payments in a protected and regulated environment."

"Flexe Payments has a wealth of experience in the e-money payment sector and this, combined with the inventive approach to payment challenges faced by merchants and payment services providers, has also resulted in the successful implementation of bespoke payment solutions."

"Flexe Payments will use ICE London 2019 to showcase payment

solutions created specifically for the African and South American markets. The latter will be done in conjunction with a strategic partner who has a deep and full understanding of these particular markets and the challenges that operators and consumers face."

"The African solution offers merchant an easy, quick and cost-effective method to accept payments, risk-free, from consumers in Africa, with settlements being made in US dollars. Furthermore, Flexe Payments will, as always, be delighted to discuss opportunities where its products can act as a bridge for customers to be able to transact online without relying on the traditional payment methods or where access to these product types are limited."

Barrett: "ICE is our biggest event of the year, and we always enjoy meeting both new and existing customers. We will be unveiling our next big innovation, which will further revolutionise the way people play games online, and will also be discussing our new retail gaming proposition."

"We'll have a small stage at our booth, where we will be presenting some of our latest insights around Pay N Play, Q&As with existing customers and larger industry trends. It'll be a busy week, so be sure to drop by our booth or schedule a meeting in advance to learn more."

Samuel Barrett has over 10 years experience working at some of Europe's biggest payments companies that specialise in offering alternative payments to the gaming industry. Prior to joining Trustly as director of gaming, Barrett held various management roles at Paysafe Group, ClickandBuy and UK FX brokerage World First.

“CRYPTOCURRENCIES ARE STILL IN VERY YOUNG STAGES OF DEVELOPMENT AND IT WILL TAKE A LOT TO REACH A MASS SCALE ADOPTION. THEY HAVE GREAT POTENTIAL TO CHANGE THE WAY WE PLAY GAMES, BUT I'M NOT SURE WE WILL GET THERE ANY TIME SOON”

Samuel Barrett, Trustly





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Great expectations

Intralot's group sports betting director **Bill Demakakos** surveys the state of play in sports betting and is excited by the future prospects for both North and South America



DEVELOPING PERSONALISED SOLUTIONS

Sports betting is becoming more customer-focused, personalised and on-demand than ever, with new products offering punters new opportunities. Players can now have a bet that is unique, as it has been built or suggested by themselves; they are also being given the freedom to amend their bet at any time via "change-my-bet" functionality.

Ease of use and simplicity were also apparent within the past 12 months in all tools and touch points, even on the retail POS with "byod" coming up strong. Younger demographics started to bring along their needs for fast-settling bet types and the socialisation of their activity; they share everything, and so they are already sharing their bets in private conversations or even posting them online.

Lastly, crowd wisdom has already been used by operators, to a certain extent, so that every participant can potentially get the benefit.

On the data side, volume, type and granularity of the sports betting data have changed, creating new performance-related markets and player props. On trading, everything goes real-time and machine learning powers up automations.

For all of the above to materialise, the technology must be there and, as an example, Intralot's new sports betting platform Orion already incorporates a number of personalisation options and capabilities in its product and player-facing modules as well as in risk management. In fact, at Intralot, our sports betting product and technology development teams have already empowered Orion with automations in its trading tools, including algorithmic pricing models, customer profiling, real-time alerts and safety nets around risk management and further advanced our robotics journey by enhancing our platform's capability for personalisation.

COMBINING MARKETS

I really expect the "bet builder" concept to keep growing in popularity; it has already gone from pre-match selected football matches only, to pre and in-play on all football games and is also available on other sports like basketball.

Clearly the customers have appreciated the idea of being able to choose and combine markets to their own liking. In many cases, it is now producing an average of 15 per cent of the football pre-match GGR and this figure is going up. We will soon see bet builder across all sports, along with cash out and player/team props available on bet builder bets.

On live betting innovations, in-play player props markets are becoming very popular. The

live count of individual player activities across different sports is getting more detailed and you can now bet in-play on individual shots, shots on target, passes, steals, three pointers, aces, double faults, etc. In addition, bet suggestion messages based on individual customer favourite markets and sports is starting to grow, as well as the dynamic in-play odds for a period – for example, increasing odds as time period goes on for incidents such as goals (pulse bets).

THE US CLEARLY HAS THE POTENTIAL TO BECOME THE WORLD'S LARGEST REGULATED SPORTS BETTING MARKET

THE LANDSCAPE IN POST-PASPA US

The US clearly has the potential to become the world's largest regulated sports betting market. On market size, I see into two scenarios: one is a fully regulated "all-50 states, all facilities, all channels" scenario with a potential of \$22bn to \$27bn in gross win.

The other is a more realistic scenario at \$9bn to \$13bn market, with a certain degree of elasticity on the number of states allowing sports betting, facilities, channels, product mix, tax levels, licence or other fees, the Wire Act treatment and the achieved "illegal-to-legal" shift rate. It is anticipated that many states will follow course with their own unique regulations until such time as, and if, federal intervention occurs.

On the actors, I believe that state lotteries must eventually be mandated to operate the game; sports betting is a wide area network game, as we have all witnessed in Europe, and as such, it connects very well to the vast retail network of state lotteries to ensure wider and faster adoption and the outreach of the game in terms also of available ways to play (e.g. anonymously).

This creates a bigger market and benefits for the state, like more revenues to serve good causes and job creation through employment in retail locations. State lotteries also possess the integrity and trustworthiness characteristics, the breadth of retail network and experience and the ability to set the market standards for responsible gaming.

THE FUTURE FOR ESPORTS BETTING

The maturity of esports is the decisive factor that will determine when esports betting will take off. Esports will continue to be smaller in revenues than traditional sports in the coming years, but it

is gaining momentum, with the rapid increase in number of spectators (15 to 20 per cent, year-on-year).

On demographics, esports is currently very popular with millennials and Generation Z, but less attractive to older generations who could make a financial impact in the market.

Although I don't see revenues reaching the levels of traditional sports' revenues, I believe esports will surpass both revenues and viewership should the broadcasters and the video game publishers find the right monetisation synergies to drive up ARPU. I expect esports maturity to come in three to five years' time, which is in line with industry expectations and partially explains most of the new investments in esports startups.

I believe that esports will grow gradually and it's a matter of a few years to mature – no more than four. Betting in esports will follow, and it's a matter of USPs to offer, in order to attract the engaged generations.

VIRTUAL SPORTS TRENDS

As technology improves, virtual sports quality will continuously improve as well and this is currently number one priority for the providers. On-demand virtual game propositions, live betting virtuals and US-themed virtual sports are trends and offerings that we soon will see to emerge stronger. This is mainly to keep virtuals at the front edge, attract new players (from casino, for example) and serve the appetite of the newly regulated US market.

REGIONS PRIMED FOR GROWTH

Apart from the obvious jurisdictions – like the US, which will easily be the biggest sports betting market on the planet in five to six years – I believe South America has great potential. Regulations are slowly taking place after Mexico and Colombia triggered the process and we see huge markets like Brazil coming that way.

Another potential region is the Far East with Japan, South Korea and Vietnam, complete with big populations, huge sports communities and fanatical sport fans, leading the way.

ON DEMOGRAPHICS, ESPORTS IS CURRENTLY VERY POPULAR WITH MILLENNIALS AND GENERATION Z, BUT LESS ATTRACTIVE TO OLDER GENERATIONS WHO COULD MAKE A FINANCIAL IMPACT IN THE MARKET

Building for a responsible future

David O'Reilly, COO at Colossus Bets, looks at the big themes expecting to emerge in sports betting, predicting a widening of products offers for single event accumulator bets and a new CSR drive from operators

INTERGAMINGi: What major innovations do you expect to see in sports betting during 2019?

David O'Reilly: "In development are a number of esports-focused betting concepts which are seeking to go beyond merely offering odds on the outcome of the next League of Legends contest. I think there will be plenty of innovation in 2019 aimed at making betting on these contests attractive to esports fans, rather than trying to offer traditional punters a conventional betting interface for esports. I'm interested in this space because Colossus Bets has done a deal to build a suite of esports jackpots for a US partner, incorporating our formula of big headline prizes with leg-by-leg Cash Out and crowdfunded Syndicate tickets.

"It would be stretching things to suggest it will be a major innovation, but it seems very likely that the bet builder products which have been built around a single game of football will extend into other sports. For example a golf major, a darts final, a Six Nations rugby match and even novelty events such as the Eurovision song contest.

"There is clearly appetite amongst punters for single event accumulator bets, enabling them to shoot for a big prize from a modest stake, on a marquee event. These single event bets provide an element of instant gratification, rather than having to wait for a series of events to resolve to hit a rolled-up winning bet at big odds."

What developments will we see in the personalisation of sports betting?

"I see in-app notifications as an area ripe for further development. For example: 'Notify me when a boosted price is offered on football, or when a market involving Tiger Woods is loaded, or when a horse race I have bet on is about to start, or (in a Colossus context) when a Syndicate Captain I follow creates a new ticket for funding.'

"This type of functionality will give players an element of control over personalisation. While advancements in AI will no doubt enable operators to better target players with offers and products which are likely to be of particular interest to them, I think letting the player determine what he or she wants may be the area most ripe for advancement."

What major regulatory challenges does your operation face in 2019, both in the UK and beyond?

"Keeping on top of the pace of change to regulations and consultations about prospective changes is an obvious challenge for us and the industry more generally. In an international context, the continuing fragmentation of regulatory standards and local licensing

requirements will ensure that the safest jobs in the industry continue to be within compliance. For smaller operators the cost of licensing in newly regulating territories will make the exercise hard to justify and this is an area where scale provides an edge.

THE PUBLIC AND POLITICAL PERCEPTION OF GAMBLING IN THE UK HAS NEVER BEEN MORE NEGATIVE AND WITH FOBTs IN THE HIGH STREET SHACKLED FROM APRIL, THE MEDIA ATTENTION WILL INCREASINGLY TURN TO ONLINE

"The public and political perception of gambling in the UK has never been more negative and with FOBTs in the high street shackled from April, the media attention will increasingly turn to online.

"I think some braver operators may seek to turn corporate and player responsibility into a competitive advantage in 2019. As one non-UK example of this, the Finnish operator Paf has recently implemented a mandatory annual loss limit of €30,000 per player. Paf is in effect saying that they are not comfortable that any of their players should lose more than this amount, regardless of an individual's income or wealth.

"The Paf approach may be a bridge too far for most operators but aside from being socially responsible, it is consistent with maximising a player's lifetime with the operator. It deviates from reliance on churn models which suggest every new player should be 'monetised' as quickly and efficiently as possible. Protecting the player and the player's longevity is also adding value to the operator's brand, in a sector where brands are not in good standing."

Where do you sit in regards to the developing picture surrounding sports betting in the US?

"It is clearly an evolving and fluid landscape and a crystal ball is required to know how it will pan out. What we do know is that early results posted from New Jersey, in particular from Draft Kings, are encouraging. There seems to be a 'fear of missing out' amongst European operators with designs on establishing a foothold in the US market. It will take a brave executive to tell his or her board that sitting on the sidelines and learning from the early mistakes of others is the right call in the short term.

"From a Colossus Bets perspective one area where we see an opportunity is with legacy pari-mutuel horseracing operators, who are no longer the only game in town for online US

punters and who quickly need to respond to the newly legalised sports betting competition. We are looking to bring the same modernised features to US tote pools as we have done with British and Irish horse racing. Colossus has been granted extensive patent protection around Cash Out in the US, which will underpin our US-facing product offering."

How are advancements in technology driving change in sports betting?

"Some of the obvious changes include improved computing power driving better and more accurate pricing (in-play in particular), better use of data enabled by advances in software and an expectation for intuitive simplicity from consumers based on their online experiences outside of betting. Changing consumer behaviour in terms of social interaction, in particular the use of messaging/chat apps, is something sports betting via a number of 'social' initiatives is trying to grapple with. Colossus Syndicates and Skybet's Group Bets are two examples.

"Perhaps the most fundamental point, though, is that ongoing developments in consumer hardware are driving change across all online commerce. Screen sizes and functionality offered by modern smartphones determine product design and presentation decisions in sports betting. Most punters now bet exclusively via mobile and the primary challenge is in making the journey from log on to transacting as effortless as possible."

David O'Reilly joined Colossus Bets in 2013 and is responsible for the company's operational and regulatory functions. O'Reilly spent the previous decade with Betfair, latterly as managing director of Betfair's Gibraltar office.



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Time to join the party

Richard Mifsud, CEO of Helio Gaming, is bullish about the prospects for a lottery vertical he believes has huge untapped potential

THE days when lottery players had no choice but to commit to sit down in front of the television, physical ticket in hand and waiting for the weekly domestic draw, are over.

In the online world, the next generation of lottery products are attracting players new and old. Instant-win opportunities feature alongside regular draws from lotteries the world over, with the increased options attracting a large number of customer demographics.

Helio Gaming CEO Richard Mifsud is a self-confessed lottery evangelist for lotteries and here he discusses the state of play in what he feels is an exciting vertical the igaming world has yet to truly embrace.

INTERGAMINGi: What is new in the world of online lottery?

RM: “We have just recently enhanced our proprietary brands by launching our Helio family of lottery games, namely The Daily Hero, Hero-Millions and the Big Hero, offering superior quality RNG based lottery games to the players.

“We are also providing betting on international lotteries, which has proven increasingly popular. These include the US Powerball, EuroMillions, MegaMillions EuroJackpot and German 6/49 draws. The number of betting on international lottery games will total about 40 well-known international brands in the coming months.

“Excitingly, we are also launching live lotteries from our Malta-based operation, which I anticipate will have the same popular appeal as live dealer in casino. People just love that type of interaction with their products. We’ll be revealing more about that on our stand at ICE.”

How do lottery players typically differ from casino/sportsbook players?

“The main difference is their loyalty, as lotteries tends to have much better retention rates than their equivalents in sportsbook and casino. Many lottery players wouldn’t consider themselves to be gamblers either. This makes adding lottery products to sportsbooks and casino sites, as we are able to do, a very interesting proposition to brands who may not have previously considered the vertical to be an option.

“The ability to attract a loyal new customer base to whom other products can be cross-sold is very appealing to casino and sportsbook operators, particularly in long-established and very competitive markets. For that reason, we are currently having lots of conversations with brands for whom having a lottery tab is no different to having a poker one. Besides promoting very large jackpots, operators can cross-promote their regular offering by providing

the likes of free spins as a result of small wins. They can retain their customers by rewarding them with lottery tickets too. Free tickets to big jackpot draws are proven to appeal to lapsed or dormant players, with 20 per cent reactivation rates not uncommon.”

How much potential is there for growth and in which markets is the scope the greatest?

“I don’t think we have scratched the surface yet. Other verticals may be in the process of reaching natural ceilings, but I think we’re a long way off that in lottery. So much of what is on the market at the moment is ripe for innovation and I also believe non-lottery operators now have a great – and simple to integrate – opportunity to dip their toe in the market.

“The beauty of it is that there are no geographical boundaries. In many countries, lottery is the acceptable face of a flutter. But is just as easily at home in long-established sportsbook and casino markets with an ingrained gambling culture. I appreciate I’m an evangelist for the next generation of lottery products, but I can’t quite believe that the world hasn’t woken up to this sooner!”

What is the future for online lottery in the US?

“The US is a particularly interesting market. It is one of the last bastions of what I would describe as a traditional lottery market. Lottery is very popular, but with a limited number of game types and a lack of innovation when it comes to products and channels. But as we’ve seen over the last year or so, things are changing. As a more liberal approach to regulation sweeps the land, I expect more of the state lotteries, faced with more competition, will look to expand their players’ offering.

“I also think other types of operators will seek to challenge their monopolies by offering lottery products themselves. There is perhaps a lot further to go than in some markets, but the pace of change may be rapid. They have a great opportunity to appeal to a new generation of players in what must be one of the most affluent and tech-savvy countries on the planet.”

Do you see the popularity of instant win games continuing to increase?

“Yes, I do. I think what the increasing popularity of these games has shown is the desire of modern audiences for a quick outcome to their betting and gaming. Whether that’s down to our shortening attention spans or the fact the technology is now available for spin and win entertainment. The rise of online casino, particularly on mobile, and the insatiable spread of in-play sports betting are excellent cases in



point. I would argue that it is now time for lottery to join the party.

“Games like our Lotto Hero product, which delivers a guaranteed million Euro draw on the hour, every hour, 24 hours a day, have a high frequency that time-poor players desire. They also want a variety of different types of draws at their fingertips, which we’re now offering as part of a full suite of games. All of these have the opportunity to win life-changing sums of money, but there is no need to hang around for the weekly draw on a Saturday night.

“This mixture of quick-fire opportunity and excitement can be the sweet spot in a re-generation of the lottery vertical.”

How can suppliers tap into the potential within Africa for lottery?

“The industry has been talking about the untapped potential of Africa for some time now. But I think there is a genuine opportunity within lottery. We’ve seen high demand in Africa in particular and are live in Kenya and Nigeria, with more interest in the Democratic Republic of Congo, Tanzania, Uganda and Ethiopia. As we have found with the deals we’ve done in these countries, players love the small-stake, big-win opportunities that lottery offers. To use that word again, there is a real aspirational quality to this side of the industry which seems to resonate across the continent.

“Regulation is very different in many African countries in comparison to Europe, as is infrastructure. But modern lottery games need very little of either and are easy to install and risk free to operate. I expect a lot more interest from African operators on our stand at ICE.”

The next generation

Golden Race is introducing what it believes to be remarkable innovations in sports games and betting solutions at ICE London

GOLDEN Race remains at the forefront of the international betting business, creating complete solutions tailored to customer needs and delivering unique, flexible and cost-effective virtual betting systems.

This time, the firm will be launching its latest innovations at the most important B2B gaming event in the world: ICE London 2019.

This highly influential gaming conference will see major companies across all sectors of the gambling industry attend, learning about the newest trends, forging business relationships and discovering the best products.

"We are honoured and proud to participate in this prestigious event," says Golden Race's CEO, Martin Wachter.

"Once again, we are more than prepared to amaze our visitors at the ICE conference with extraordinary improvements in our games and betting solutions."

Golden Race has a set of surprises ready for all attendees approaching the stand at

S2-322. Among a series of new products and conferences, the firm will present advanced versions of its virtual sports games and betting solutions.

FAST AND ENGAGING

Golden Race's visitors will discover the latest versions of its eye-catching, realistic competitions, entirely in digital 3D.

As leaders in the use of live-rendering technology, this makes games extremely easy to set up and each event unique. In these competitions, clients can create any personalised match desired and focus on maximising their profit, thanks to fast and data friendly solutions.

"Keeping our customers engaged in betting while enjoying the sports experience is the key focus for Golden Race, as well as to continue to lead in this area by introducing innovations in the market," adds Wachter. "Because of the advances we keep implementing, we remain leaders in providing virtual sports that offer the ultimate absorbing experience."

ENHANCED UX

Golden Race anticipates customers' demands by applying the latest technologies to significantly improve user experience.

Introducing HTML5 to its games, they are simpler, lighter and more dynamic and contain more beautiful visuals, more animations and faster updates.

With Golden Race, operators can be sure that the products are equipped with the state-of-the-art software solutions that their businesses need. And players will find themselves immersed in the betting events like never seen before.

NEW TERMINALS CATALOGUE

A fresh catalogue of betting terminals features cutting-edge products, pre-loaded with the entire gaming suite. They include an intuitive cashier interface and independent and connected jackpots. The games are completely white-label, allowing operators to apply their brand colours and logo, and even animated promotions, directly in-game.

FANTASY SPORTS SUPPORTED EDITORIAL

Creating the future of fantasy sports

Fantasy Sports Interactive's marketing and communications manager **Maria E Arnidou** takes a look at how the player market is evolving

IN a world where sport both brings games to life and inspires gaming entertainment globally, fantasy sports just may be the very first line of sports gamification.

Fantasy sports have been a favourite gaming pastime for decades. In the US, for example, fantasy golf was devised as far back as the late 1950s, while in the UK, the original fantasy Premier League format was created in 1971.

The combination of real life games and statistics with the fantasy emulation allows every sports fan to become a manager. The bragging rights and prizes have helped to make fantasy sports popular worldwide. This has led to an online, fast-paced and competitive concept, which is able to succeed either as a standalone product, or as a user engagement and marketing tool.

Realising fantasy gaming's potential early on, FSI (Fantasy Sports Interactive) was the first company to launch a dedicated fantasy betting product under its Bet4theBest label, as a proof of

concept – a concept of the fantasy future that was still to come.

The market indicated that after the open season-long format, mature fantasy audiences, such as the UK audience, would embrace a faster, monetised and more competitive experience, as the US did.

Under this scope, FSI focused on fast and easy gameplay and betting, by introducing an innovative no budget/salary cap fantasy sports concept which focused on team management instead of basic, standalone contests.

The latest industry trends in the US show that the future of fantasy sports is linked to the future of the sports betting and gaming.

At FSI, we believe that the next gen fantasy concepts should be able to bridge the marketing gap between operators' offerings and increased customer acquisition and retention.

After bringing forth fantasy sports as a versatile business and marketing solution, we have

developed the next level of fantasy gaming.

FSI has fused originality with familiar formats to create the solution to operators' main issues, such as marketing expenses, liquidity, licensing and risk management.

The next chapter in sports gaming software will be written according to audiences' demands and operators' needs as well.



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INTERGAMINGi AFFILIATES

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TAMING THE WILD WEST

Maximising US affiliate opportunities while avoiding pitfalls



THE BIG QUESTION

How important is a long-tail keywords strategy?

AN EVOLVING LANDSCAPE

Tackling compliance issues within the UK



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CONTENTS // THIS ISSUE...

NEWS

- 04 Better Collective completes Ribacka Group deal; Ladbrokes Coral's relaunched affiliate programme

LAC

- 07 Intertops celebrates 20 years with giveaway; Betsson hosts ex-Liverpool player Riise



UNITED STATES

- 08 The Wild West: A look at affiliate opportunities in the States

POKER

- 11 WPN giving players a shot at a shot at a \$5m jackpot

TRENDS

- 13 Global Gaming Affiliates looks ahead



THE BIG QUESTION

- 15 Talking long-tail keywords with ActiveWin's Bernadette Kelly

GPWA

- 16 Should webmasters help fight gambling addiction?

COMPLIANCE

- 18 Moving forward with operator affiliate relationships in the UK



MATT CHAMBERS - EDITOR

THE GREATEST SHOW

AS a first-time visitor last year, the London Affiliate Conference was noteworthy particularly for its open, relaxed feel.

Still, though, in spite of the lack of three-piece suits and its youthful feel, this huge event – over 5,000 people are expected to attend this year – is, of course, not simply about an excuse to kick back.

The show organisers have been proactive in learning about what visitors would really value from the event and have curated a suitably on-point speakers list, while also amending the floorplan to allow for additional space devoted to networking.

One topic which is likely to be brought up in many conversations at ExCeL London is affiliate activity with the United States – an issue we examine in this, the first issue of *INTERGAMINGi Affiliates* of 2019.

We talk to those firmly in the know – Becky Kingman-Gros of Global Gaming Business, USBets' Adam Small and Catena Media's Michael Daly – about the challenges, dangers and opportunities available in the US following on from the repeal of PASPA.

Elsewhere in this edition, we examine long-tail keywords with Bernadette Kelly from ActiveWin. Outranking the bigger players in organic is of course a very difficult task for younger affiliate sites when it comes to generic search terms, but there are tools available for more specific patterns and phrases.

We also hear from Oren Arzony of House Tech Ads, who believes that the power of affiliate programmes remains undimmed.

There is also our usual picking-out of an eye-catching topic from the GPWA forums. This time, the debate concerns webmasters' duties over gambling addiction. Exactly whose job is it to police problematic behaviour? It's an interesting debate.

Enjoy the show.

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#AFFILIATES NEWS

HEADLINES

BETTER Collective has completed the acquisition of all shares in Ribacka Group, incorporated in Sweden, for a purchase price of up to €30m.

BC

Ribacka expects to generate a revenue of more than €6m in 2018, with operating earnings more than €5m. An initial payment of €15m in cash will be followed by €6m in May 2019, either in cash or ordinary shares in Better Collective. The remaining €9m will be paid in 2020, pending certain agreed performance criteria.

Ribacka owns a network of Swedish sports betting and casino marketing platforms, including www.speltips.se.

Ribacka will stay headquartered in Stockholm under the name Better Collective Sweden. The two former owners of Ribacka, Jesper Ribacka and Jens Ribacka, will continue as local CEO and board member, respectively, in Better Collective Sweden.

They will work closely together with the Better Collective headquarters in Denmark, to ensure continuity.

LADBROKES Coral Group, the UK-based multi-channel bookmaking and gaming company acquired by GVC Holdings in March, has announced the relaunch of its affiliate programme in partnership with Income Access, Paysafe Group's marketing technology and services provider.

The Ladbrokes Coral Partners affiliate programme will be powered by Income Access' affiliate software platform, as it aims to optimise growth and acquisitions across its internationally recognised brands.

Ladbrokes Coral Partners is the official affiliate programme for three of the UK's top converting betting and gaming brands: Ladbrokes, Coral and Gala. The trio of brands combine to offer an array of gaming experiences across their sports betting, casino, bingo, poker and lotto products.

Anat Schlesinger, marcom manager at Ladbrokes Coral Group, said: "As the Coral and Gala brands have worked with Income Access for a number of years, it felt like a natural fit for Ladbrokes to be migrated onto the platform. Relaunching the affiliate programme also provides an opportunity to make essential updates and help Ladbrokes achieve greater synergy with Coral and Gala.

"We have a great relationship with the team from Income Access and have every confidence that we will see great results with the new and improved affiliate programme."

GAMBLERSPICK.COM, the community-driven online casino portal managed by affiliate network House Tech Ads, has awarded top-tier online casinos its first Select seals of approval.

The first brands to be recognised are Bet365, PlayOJO, Twin Casino, 888, Royal Vegas and Jackpot City, chosen for their commitment

CATENA Media has announced that Erik Edeen has been appointed as its new interim CFO, succeeding Pia-Lena Olofsson.

Edeen has more than 12 years of experience from working in leading roles within finance in private and public corporations, including ICA Gruppen and Investor. Most recently, he was group CFO for a European IT company.

"While welcoming Erik Edeen, I also want to thank Pia-Lena Olofsson for her time at Catena Media and wish her all the best in her continued career," said CEO Per Helberg.

Edeen becomes part of Catena's executive management and the recruitment process for a permanent CFO has been initiated.



to the highest standards of credibility, customer experience and player safety while maintaining a diverse selection of the best cross-platform games.

GamblersPick Select was launched to provide a stamp of approval guiding players to find the highest-rated online casinos.

AFFILIATE compliance tool Rightlander has put pen to paper on a deal that will see it provide online sportsbook operator Argyll Entertainment with its technologies.

Argyll, which operates the RedZone, SportNation and GiveMeBet brands, will now use Rightlander's advanced solutions to take its compliance procedures to the next level.

Rightlander will scan Argyll Entertainment affiliate websites, monitoring all activity which mentions or links to their brands for compliance related breaches, while also searching for certain events and conditions defined by the operator.

This puts the power in the operator's hands, allowing it to ensure that all affiliates sending traffic to its sites are doing so in a compliant and responsible manner.

TRAFFIC Label, a UK-based firm specialising in the development of comprehensive marketing strategies, has announced the launch of an affiliate programme for its SlotsAffiliates.com network with Income Access, Paysafe's marketing technology and services provider.

Through its integration with Income Access' affiliate software platform, SlotsAffiliates.com will look to optimise growth and acquisitions across its six network brands.

SlotsAffiliates.com was launched in May 2018, when international white-label gaming software and services provider Nektan partnered with Traffic Label to create a multi-brand network that included SpinSlots, Slotster and JackpotSlot. Since the launch, three more Nektan-powered

brands have been added: VIPBet, Royal Bets and Slots Jungle.

Affiliates of SlotsAffiliates.com will access a cutting-edge, slot-focused programme that leverages hundreds of game titles across its current collection of brands. Between its catalogue of classic casino games and partnerships with leading developers such as Microgaming, NetEnt, Evolution and Nektan, SlotsAffiliates.com offers a diverse gaming experience that supports robust marketing initiatives.

RAKETECH has reported increased revenues and continued organic growth, which the online gaming affiliate and content marketing company attributes to capitalising on existing assets.

Revenues for Q3 2018 increased by 42.3 per cent to €7.0m (Q3 2017: €4.9m), with organic growth at 28.6 per cent (32.6 per cent). Adjusted EBITDA was up 45.2 per cent to €4.1m (€2.8m), corresponding to a margin of 58.7 per cent (57.1 per cent); adjusted operating profit was €3.7m (€2.6m), with a margin of 52.4 per cent (53.6 per cent).

Profit for the period amounted to €1.7m (€1.6m) and new depositing customers increased by 49.0 per cent to 26,837 (18,010). During Q3, interest-bearing liabilities of €15m were repaid to Ares Management and Raketech announced a new partnership with Sper to reinforce responsible affiliate marketing efforts in Sweden.

The earn-out conditions related to casino affiliate site Casinofeber.se were amended in September and the earn-out period extended until 2023. Management's best estimate of the outstanding earn out liability amounts to €9m.



The draw of history

Intertops Affiliates is marking its 20-year anniversary by sharing the love – and a host of tech prizes – at LAC

INTERTOPS is marking the 20th anniversary of its ground-breaking affiliate programme by giving away stacks of Apple products at the London Affiliate Conference.

The pioneering company's very first affiliate – who to this day, receives monthly commissions for players he introduced way back when – will draw the final winner.

Hourly draws across the two days of LAC at ExCeL London will award four iPhones, six Air Pods, four iPads, five iWatches and one MacBook Air.

"We've got 20 prizes for 20 years," said an Intertops spokesperson. "One Apple product every 30 minutes. For a chance to win, all that is needed is to come by our stand and drop a business card into the bowl."

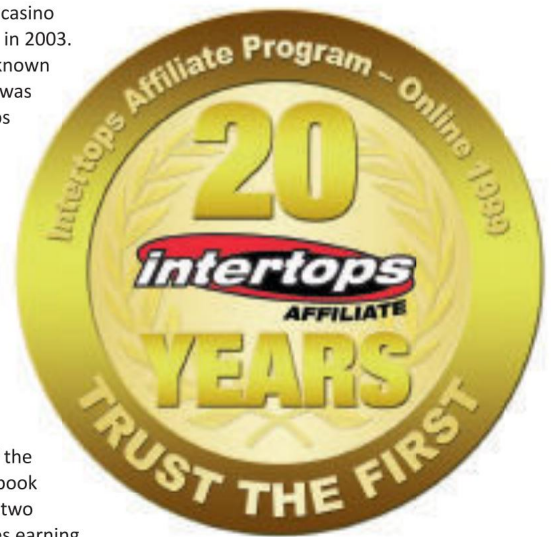
Intertops markets itself as the most trusted online gambling brand in the world, having become famous for taking the very first online sports bet in 1996. Two years later, the

pioneering company ventured into the casino business and later added a poker room in 2003.

One of Intertops' first affiliates was known as "Suchknecht". Twenty years ago, he was delivering the daily post to the Intertops office when one day he sat down for a coffee with the company founder and learned about the igaming industry. He invented a search engine and started promoting Intertops: now, he continues to receive monthly commissions for the players he referred in those early days.

Suchknecht will be on hand to talk about the good old days of affiliate marketing at LAC.

Intertops Affiliates pays an up to 35 per cent commission for the lifetime of the player. The company operates a sportsbook with esports and live betting as well as two casinos and a poker room, with affiliates earning revenue for players across all products.



A sporting chance

A familiar face to football fans is set to attract attendees to Betsson's stand at LAC

BETSSON ambassador and former Liverpool and Norway star John Arne Riise is to engage attendees at the London Affiliate Conference by running a football contest.

Hosted on Betsson Group Affiliate stand 136, Riise will run a contest featuring a leaderboard in which players are invited to hit the target to achieve a score higher than Riise manages himself.

Achieve it, and players can claim prizes including a signed Liverpool shirt and signed footballs.

There is also the opportunity for the experience of a lifetime in meeting Riise in person and going away with a signed photo, with a Fuji instant camera printing pictures with the Champions League winner to take away there and then.

Riise will be also going round the arena to meet and greet all attendees of the show.

Factfile: John Arne Riise

BETSSON ambassador John Arne Riise was born in 1980 and started his career when he was 16 years old with his local team Aalesund.

After a single season as a senior player, the left-back headed abroad to play for Monaco where his performances attracted the attention of several Premier League teams.

In 2001, Riise signed for Liverpool, where he spent the best days of his career. He spent seven years at Anfield, claiming a Champions League medal in 2005 after playing in the famous comeback victory over AC Milan in Istanbul.

An ambassador for Betsson for six years, Riise is the most-capped player for Norway's national team, having made 110 appearances.



Taming the wild west

With the opening up of the US sports betting market following the repeal of PASPA, we examine the lie of the land for affiliates both in this vertical and beyond

THE respective push and pull factors of increasingly stringent regulation within the UK and elsewhere in Europe and the opening up of the US market, post-PASPA, act to present affiliates with new choices.

For around a decade and a half, affiliate programmes have produced a major chunk of player acquisitions for operators within the UK.

A compliance crackdown has resulted in some difficulties within the operator-affiliate relationship – and when it comes to sportsbook, sights for some have been trained on the developing picture across the pond following on from the US Supreme Court's striking down of PASPA in May of last year.

Affiliates can grasp the opportunity to gain a foothold in an overall sports betting vertical in the US that is predicted to be worth \$4.9bn by 2023 as states continue to regulate.

Michael Daly, Catena Media's US general manager, says that affiliates in a regulated sportsbook market will work in a very similar way to the way they currently do for regulated casino markets in the US.

"Each state in the US with any form of gambling, land-based, has a well-established protocol for regulating operators and vendors," he says. "And, for those less familiar with the US, it should be noted that each state has similarities but also differences. And it is not just 50 states to consider (though not quite all 50 have gambling) but there are dozens and dozens of tribal regulatory authorities who each have charge of regulating their sovereign nations that sit within the boundaries of the United States.

"One must consider all of these and work with each as they come online if they wish to be an affiliate for the US market. While I expect parts of what New Jersey has done will propagate, each jurisdiction will be different in some way as that is how it has been for land-based for the last 20-plus years."

Affiliates go through the same process to promote sports betting as they do to promote other form of online betting, says **Adam Small**, CEO of US affiliate USBets, at least in New Jersey.

"We expect this to be similar in Pennsylvania, though Pennsylvania is charging affiliates a significant amount of money just to enter the market," says Small.

"In New Jersey, you really only need to fill out a few forms and go through some background checks. In Pennsylvania, the paperwork appears to be a bit more onerous, and even the lowest tier affiliates will be shelling out \$3,000 or more before they ever get started. I see the NJ model having more traction than the PA model in future states, but it could also end up being the case



that each state ends up doing things a little bit differently."

According to iGaming Player's **Becky Kingman-Gros**, who is COO at *Global Gaming Business magazine*, online sports betting is so new to the US affiliate market that it's a case of everyone learning as they go - similar, in fact, to the US igaming market of a few years ago.

"In our experience, the online gaming operators who have jumped into the sports betting pool, have simply offered that immediately as another revenue stream to existing affiliates," she says. "In general, the process to become a sportsbook affiliate seems relatively easy. It encompasses a simple application and brief vetting process. It's still unclear what licences will be required – if any – in states with legal sports betting. Pennsylvania requires a licence to be an igaming affiliate, but there is no mention in the sports betting law of affiliates."

BECKY KINGMAN-GROS,
GLOBAL GAMING BUSINESS MAGAZINE:

"It seems like a switch was flipped with the repeal of PASPA and now sports betting is no longer taboo. Sports commentators casually discuss fantasy teams and wagers on various events. Sports betting has quickly become mainstream."



As an affiliate, Kingman-Gros gained entry to the US market in New Jersey following on from the legalisation of online gaming in 2013.

And she is emphatic in making the point that affiliates are taking an enormous risk should they

work with offshore sites serving the US market.

"As an entity licensed and regulated by the NJ DGE (Division of Gaming Enforcement), we would be jeopardising our DGE approval by working with illegal sites. This will stand true for other jurisdictions as well.

"I'm sure there are affiliates who play both sides of the fence, but they are risking losing a licence they pay dearly for. They're also harming the legal participants in this market by continuing to shine a light on the illegal side of gambling.

"The downside for players is the confusion this can cause, since players may not be able to discern legal sites from illegal sites. The players are at risk since there's no legitimate licensing authority regulating these operators."

Daly also emphasises the point that affiliate licences can be placed in jeopardy by working with illegal operators.

"New Jersey's regulatory body, the DGE, has already put all operators in its state on notice that if they work with an affiliate that is also working with offshore operators then they must cease and desist or will jeopardise their New Jersey licence. This is one thing I do expect to be widely replicated by other states."

Small concurs, stating that attempts to play both sides of the fence are inevitably doomed.

"Affiliates are strictly prohibited from promoting both offshore gambling sites and regulated US sites. Even if an affiliate is only promoting regulated casinos in New Jersey, they are prohibited from promoting offshore casinos anywhere at all. We've seen many affiliates try to do both, but they always ultimately get banned from the regulated market."

Affiliates looking to enter the US sports betting scene would also do well to take heed of a media environment in which attitudes towards betting are softening, to the extent that traditional sports media are reportedly examining ways to get involved in the action.

"While I can't tell you the inner workings of any of those groups, I know it is definitely a topic of discussion for many of them," Daly says. "Some are going to try to be affiliates themselves. Others are or will be reaching out to organisations like Catena Media to see about working with us to help monetise some of the traffic that hits their sites.

"To me, that may be the better approach as it keeps the sports media groups independent from the betting world, which seems to be a concern of the leagues, allows them to limit the invasiveness (and costs) of regulatory oversight, and allows each to focus on what they do best. There is definitely a history in Europe, with a few exceptions, that being a strong sports media 'publisher' does not always translate to being a good affiliate."

Kingman-Gros believes that the softening of attitudes towards sports betting from mainstream media outlets relates to daily fantasy sports paving the way in terms of its acceptance.

"It seems like a switch was flipped with the repeal of PASPA and now sports betting is no longer taboo. Sports commentators casually discuss fantasy teams and wagers on various events. Sports betting has quickly become mainstream. But will networks like ESPN or CBS or NBC Sports become affiliates themselves or will they even open up their own sports books? That question is still to be answered."

Small argues that the process has already begun.

"We've seen a couple affiliate sites go up that are either owned by Gannett (the American print media giant with revenues of \$3bn in 2017) or are closely partnered with them, so that would be the most direct way a traditional media outlet has tried to monetise sports betting in New Jersey.

"But more, we're seeing major media outlets add sports betting content, including entire betting focused shows. We think that's just the tip of the iceberg."

While the scenarios for sportsbook affiliates remain embryonic in the main, it's clear to Small that – for the time being at least, ahead of further state regulation – it's a difficult battle for attention within online casino.

ADAM SMALL, USBETS:

"The industry is tough, because as of yet there's only one state where you can make any money, and the state isn't big enough to support very many affiliate enterprises."



"The industry is tough, because as of yet there's only one state where you can make any money, and the state isn't big enough to support very many affiliate enterprises. The people who have been successful there are very deeply engaged in the US igaming industry and community and have been able to create high value content that has significantly aided the trajectory of the market.

"Pennsylvania is coming soon, which we estimate to be a similar opportunity to New Jersey – higher population, but lower player values due to exorbitant taxation. For the most part, it will be the same affiliates competing for traffic in both states."

Daly, meanwhile, holds the view that cost considerations could put off some potential online casino affiliates.

"The US affiliate industry for online casino is currently limited to just a few markets, being New Jersey, Delaware, Nevada and West Virginia. Except for New Jersey, the others are each limited in some way, be it the type of product they can offer (WV sports betting, NV poker) or by the way the state is running, such as DE which is a single online provider.

"New Jersey has been a good market for those affiliates willing to undergo the comprehensive licensing and should remain that way for the near term, with some new entrants expected to bolster marketing spend in the state next year. The overall opportunity is expected to be large once more states start to come online, though that will be at a slower pace and at a higher regulatory cost than may be palatable for some affiliates."

Kingman-Gros makes the point that with online gaming in its infancy in the US, while thousands of generic avenues exist for affiliates, the opportunities within online casino are very much restricted to "a few dozen".

"However, with so many states looking to legalise online gaming, that number will double and then quadruple within the next year to 18 months. Each state that legalises online gambling can increase the number of potential partners for an affiliate by at least a dozen."

If life is tough for an affiliate looking to crack the current online casino market Stateside, online lotteries remain an even more daunting prospect.

"It's a lot harder than online casinos, at least for affiliates primarily focused on organic traffic," says Small. "You're working with a single partner in each state, and that partner has total control over the affiliate agreement and typically bars affiliates from trying to rank for any of the bigger lottery-focused search terms. We've had some minor success in Pennsylvania, but we haven't been able to justify making it a focus."

Kingman-Gros says that with opportunities for online lottery affiliates limited – only two states currently engage in such relationships – this, combined with low ticket prices, limits revenue potential and thus appeal for many.

"The upside of dealing with lotteries is there's no licensing fee and the application process is very easy," she says. "I feel it fits nicely into our offerings so I will promote the lotteries and continue to grow that vertical."

Online lotteries, Daly says, are a mixed bag for the affiliate.

"Lotteries tend to see an easier path to online offerings in the US, such as Michigan where they have had online lottery for some time now but still can't manage anything else online.

"However, the nature of the lottery in a state being essentially monopolistic limits the free market economy and thus creates an environment where there are not multiple operators vying for customers so the need for strong affiliates is reduced.

"There is still a market, but it is artificially priced and capped by the lottery authorities. I would, personally, like to see the lotteries online in all states but not to the detriment of all other online business – as was seen in the recent move by the Governor of Michigan (Rick Snyder), who indicated concern for the lottery was one reason he was vetoing the bill to allow more forms on online gaming."

Taking in an overall view of the igaming landscape in the US, though, Daly says it will eventually become a great market – though not immediately.

"While it may be the talk of the town right now, I'd suggest all companies considering entering this space have a good business plan before starting," he says. "But it's important that you expect that your ROI may not come in one month, or even in year one."

MICHAEL DALY, CATENA MEDIA:

"While it may be the talk of the town right now, I'd suggest all companies considering entering this space have a good business plan before starting."





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The year of the affiliate

Winning Poker Network is primed to give all levels of poker players a shot at a \$5m jackpot, with plenty of scope for affiliates to cash in on the action

If you've been following the online poker headlines, you already know that a major \$5m guaranteed poker tournament with a \$1m first-place prize is on the horizon.

It's called "The \$5 Million Venom" and it represents one of the biggest ways for affiliates to boost their revenue in 2019. But it's not the only tool at the disposal of iGaming affiliates looking to profit this year.

The Winning Poker Network, with flagship brand Americas Cardroom, is making 2019 the year of the affiliate — and of course, the year of the player in the process. And a lot of the revenue-boosting opportunities are already in full swing at the US-facing online poker network.

Starting February 10, WPN unleashes its seventh OSS Cub3d, a three-part online poker tournament series designed to appeal to players of all stripes. The OSS Cub3d includes the Mini Online Super Series (MOSS), Online Super Series (OSS), and Bigger Online Super Series (BOSS). As the three-part series progresses, buy-ins creep up from micro-stakes to mid-stakes to high-stakes.

“WHENEVER WPN RUNS THE OSS CUB3D, CONVERSIONS TEND TO SKYROCKET, HELPING AFFILIATES MAKE MONEY EFFORTLESSLY”

Whenever WPN runs the OSS Cub3d (remember, this is the seventh one), conversions tend to skyrocket, helping affiliates make money effortlessly. That's no surprise as there's over \$8m in guaranteed prize money, including two \$1m tourneys. There are 169 events in all, and friendly buy-ins across the board.

The leaderboard component of the OSS Cub3d is also a big deal for players — and this year is no different. In fact, it could end up boosting conversions even higher.

In all, WPN sites are paying out 10 seats in the upcoming \$5 Million Venom. That's three seats in the MOSS, four in the OSS and three in the BOSS. This is a major deal for affiliates looking to make money for more reasons than one.

The price of entry for the biggest online poker tournament ever for US players is \$2,650. And while that's a little pricey on the surface, dig a little deeper and you'll see that this is truly a game-changer for affiliates.

WPN is making The \$5 Million Venom accessible to all — including those micro-stakes players who live and swear by the MOSS.

Right now, online poker players can enter a \$0 Step Tournament and work their free buy-in through five additional steps and into a seat in



The Venom. To recap, that's the chance to play in a \$5m guaranteed poker tournament for free.

One of the biggest challenges for affiliates is convincing players to part with their money. WPN has significantly reduced that barrier by offering \$0 qualifiers for a \$5m poker tournament. To be clear, players can enter these qualifiers without having to make a deposit.

When players are ready to deposit, they'll find an ally in WPN with an easy way to bypass financial institutions and potential credit card declines.

WPN has secured its spot as the top poker network for cryptocurrency deposits and withdrawals. Today, crypto accounts for over 70 per cent of the network's business, a sign that poker players are embracing it in spades.

While bitcoin remains the crypto of choice, it's far from the only one. WPN sites accept over 60 cryptocurrencies for deposits and withdrawals. For poker players, it means no excessive fees or time delays, plus the advantage of anonymity and decentralisation.

For affiliates, it means fewer rejected transactions and ultimately higher conversions. The prospect of getting paid virtually instantly is also a major selling point. Players don't have to wait a month for a check in the mail or a wire. With crypto, withdrawals are virtually instant.

The innovations extend beyond WPN's banking system. This year, the online poker network is focused on pumping out new products to help

affiliates always stay current.

Launching soon is Blitz Poker, a fast take on No Limit Hold'em. In Blitz Poker, instead of joining a specific table when buying in, players join a pool of other likeminded players in search of a faster game. And that's exactly what they'll get.

Whenever a player folds their hand, they're immediately dropped into a new seat at a new table. Seated with them at the new table are other players who have just folded their hand too.

By quickly moving to another table, players don't have to wait long to see a new hand they're ready to play. And if the next hand doesn't work out, the player can fold again, and again, and again until they like the hand they've been dealt.

While Blitz Poker players wait to be dealt a good hand, WPN is dealing affiliates a winning hand every day in 2019. With so much innovation ahead, things are just getting started.

“WPN HAS SECURED ITS SPOT AS THE TOP POKER NETWORK FOR CRYPTOCURRENCY DEPOSITS AND WITHDRAWALS. TODAY, CRYPTO ACCOUNTS FOR OVER 70 PER CENT OF THE NETWORK'S BUSINESS, A SIGN THAT POKER PLAYERS ARE EMBRACING IT IN SPADES”

Smart thinking

Adriaan Brink, BetterBetting founder and CEO, discusses the firm's BETR platform following the recent launch of its blockchain-powered affiliate programme

A NEW version of BETR's smart contracts was released recently, which provided improvement and additions to the system – a decentralised sports betting marketplace, utilising the BETR token.

In among the enhancements was the introduction of BETR Affiliates. The core logic added to the smart contract made it possible to tag BETR wallets introduced by affiliates, enabling affiliate commissions to be paid instantly from the layer's wallet.

This affiliate model is quite different from others in the industry in that the commission is calculated from every losing bet – so when a bettor loses a bet, a percentage of the bettor's losses are automatically paid by the smart contract from the layer to the affiliate's wallet.

Here, *INTERGAMINGi Affiliates* looks at the appeal of the BETR product offering and the peer-to-peer model.

INTERGAMINGi Affiliates: What does the BETR suite of applications offer for players?

Adriaan Brink: "The BETR products on offer include the BETR Odds apps which display the markets and prices, the BETR Wallet to provide access to tokens and the BETR Layodds site to lay on events and leagues.

"All are independent products which work seamlessly together. The essence of the system is decentralised betting, providing a way for two parties who don't know each other to bet with each other without relying on any third-party escrow or betting exchange.

"Bets are stored on the ethereum blockchain,

providing transparency and provable fairness on the transactions, a unique security feature for players. Importantly, because there is no middle man, the odds are the most competitive on the market and there are no fees.

"Decentralised betting provides access to betting opportunities that did not previously exist, allowing for betting anywhere and for any amount, without users being cut off. Players also have instant access to winnings as they are distributed as soon as a bet is resulted."

How have players taken to it since the World Cup last summer?

"We released the initial version of the system in time for the World Cup, providing one of the very first mechanisms for two parties to bet on the blockchain, using secure smart contracts and our BETR token. Following detailed feedback, we significantly improved the design of the apps and added UX enhancements which provide a clean, fresh interface.

"With an interface more familiar to traditional players, we are increasing the user base and also seeing more adoption by layers. More sports have been listed due to demand and we have introduced in-play betting on major leagues. While player numbers to date have been driven by organic growth, we are now initiating more active marketing campaigns to drive further liquidity."

Why does peer-to-peer sports betting have a bright future and how quick and user-friendly is it right now?

"With peer-to-peer betting using our model it is possible to build sportsbook clients that operate with no human or business entity

between users. This is a unique aspect which provides transparency for a bet – a paradigm shift for sports betting.

"We see it as the future of betting, in the same way the internet was the future of communications 20 years ago. Our system facilitates a much slicker method for instant betting, enabling one-click bets from many potential channels.

"For example, we have just launched @TheBETRBOT on Telegram messenger. It allows you to interact with the betting system in an easy to use format with minimal clicks. While our products are easy to use, there are still some challenges getting players to adopt the idea of cryptocurrencies, exchanges and crypto wallets. However, these areas are constantly being developed and improved for ease of use for newcomers."

To what extent is the appeal of a decentralised online sports betting environment still evolving for operators and players?

"The blockchain and crypto space is continually developing. New advancements in blockchains efficiency (cost) and speed are allowing for faster more reliable transactions, important in applications such as in-play betting. The price fluctuation of crypto tokens and coins can also put some punters off, however as our usage increases we do expect this volatility to reduce. Looking ahead, we see the BETR token taking the place of outdated payments mechanisms and becoming the industry standard for a transparent sports betting system."

Why did you decide to launch the affiliate programme in the way that you did? What advantages lay in an affiliate programme that uses smart contracts?

"We recently updated the smart contracts which allowed us to add core logic for tagging BETR wallets to affiliates. Based on the blockchain, this allows commissions to be paid instantly from the layer wallet. The commission is calculated from every losing bet, so when a bettor loses a bet a percentage of the bettor's losses are automatically paid by the smart contract from the layer to the affiliate's wallet. Commission is initially set to 1.5 per cent, which equates to approximately 20 per cent of gross gaming revenue, depending on the margin of the bets.

"The advantages are that there is no negative exposure to winning bets and, more significantly, the layer pay-out is instantaneous on settlement of a bet rather than at month end. There is also no negative carry-over as with traditional affiliate programmes and no way that tagged wallets can be de-tagged. The instant commission pay-out from layer wallets and permanent tagging is a first in this industry."



Shifting sands

Elaine Gardiner, head of Global Gaming Affiliates, reveals the trends that are set to shape the affiliate marketing space in the coming months

THE start of a new year brings the perfect opportunity to re-evaluate the current landscape we operate in, and 2018 certainly saw the marketplace experience some changes.

Of course, from our perspective we can look back fondly on the launch of our new affiliate programme, which was well received by the industry. However, Global Gaming Affiliates formed just one part of a busy year.

MUSCULAR MOVES

Continuing in the same vein as the previous year, 2018 saw M&A activity dominating the headlines. The big-name affiliate groups flexed their muscles once more to further strengthen their growing portfolios, with Better Collective closing the year announcing the acquisition of the Ribacka Group for €30m in December.

As we look ahead to 2019, that trend is set to continue in the months ahead as consolidation remains at the forefront of business executive minds. Many of the affiliate groups are becoming bigger and stronger, with the current landscape looking very different to that of a few years ago.

While M&A can help to fast-track growth, it's important that we don't lose sight of why these small to medium sized operations became an attractive proposition in the first place.

Some businesses struggle to keep the identity and personal relationships they have with customers when acquired, with new protocols to follow often impacting working partnerships.

Keeping hold of those close relationships developed between account managers is really important. At Global Gaming Affiliates, it is a core value for us and what we believe separates us above the rest. Relationship management has never been more important, so it is vital to treat all involved parties as valued customers.

TIGHTER REGULATIONS

This year will see regulatory changes sweep across the igaming industry and the affiliate space will prove to be no exception.

What we can expect to see over the coming months is increased scrutiny over KYC checks with affiliates and verifying payments made.

Tighter procedures are welcomed by Global Gaming Affiliates, as it allows us all to operate within an even safer and more secure environment. Our casino brands already have strong KYC procedures in place thanks to our PayNPlay model. All the information we hold is gathered from each individual's bank account via an eID authorisation, reinforcing our responsible gambling measures.

As we've seen across multiple jurisdictions in recent times, the way in which operators market their services to customers is being restricted. In the UK, tighter controls are set to be put in place to limit the number of gambling adverts broadcast during live sporting events.

Over in Sweden, the new regulatory framework means operators are limited to pushing bonus offers to just one per new customer upon deposit.

Promotional offers have been an integral focus point for affiliate marketing, but these regulatory changes will see a shift towards developing improved content in order to drive traffic.

Although the old saying that "content is king" may sound repetitive, it really does ring true for our sector. What's imperative is that the content is appealing when targeting a specific audience.

EXPANDING BUSINESS OPERATIONS

2019 promises to be an exciting year for Global Gaming, with exciting new product launches and potential expansion into new markets on the horizon, building on what was an impressive year for us.

Highlights from the previous 12 months include our flagship brand Ninja Casino entering the regulated market of Estonia, where the Global Gaming group has had operations since 2015.

In addition, we were successfully granted five-year casino and sportsbook licences by the Swedish Gambling Authority to operate in the newly regulated marketplace.

Sweden is a key market and the change to the regulatory framework was a welcome decision for Global Gaming. It will be fascinating to see how the market plays out throughout the year, but as a pioneer of adopting the PayNPlay concept, we believe we are well positioned to capitalise on future growth.

SPORTSBOOK INTEGRATION

This year will also see our brands offer sports betting for the first time. Following an agreement with Kambi, we are in the process of integrating its sportsbook, including its open-APIs and sophisticated risk management tools onto our proprietary platform, ready for a full launch later this year. The addition of sports betting to our casino offering is set to enhance the user experience greatly, offering players a wider variety of products to choose from.

At Global Gaming Affiliates, we have some exciting and innovative new tools in the pipeline to help serve our affiliate partners in the future. Following the re-launch of our affiliate programme last year, we're ready and excited to continue with our early success.



In Numbers

Denmark-based affiliate business **Better Collective**, the provider of betting tips, bookmaker information and gambling tools, now boasts over 1,000 websites and is targeting the US market



Financial highlights, Q3 2018

Revenue €11.13m (Q3 2017: €6.64m) – growth 68%; organic growth 15%
EBITDA before special items €4.76m (€2.82m) – growth 69%; margin 43%
EBITDA after -€0.11m special items: €4.65m
New depositing customers over 67,000 – growth 102%

Bought Greece-based WBS P.C. for up to €4.4m
First revenue from US sports betting recognised

Financial highlights, Q1 to Q3 2018

Revenue €28.35m (€16.89m) – growth 68%; organic growth 19%
EBITDA before special items €10.69m (€7.38m) – growth 45%; margin 38%
EBITDA after -€3.97m special items: €6.72m

Active in

Denmark, Austria, France, Greece, Romania, and Serbia
Income tax for first nine months of 2018: €2.06m (2017: €1.52m)

Targets up to 2020

- Revenue growth 30 to 50% per annum, including M&A
- EBITDA over 40% before special items

Calendar

February 19, 2019: Interim financial report Q4, 2018
March 20, 2019: Annual report
April 25, 2019: Annual General Meeting

Share price

SEK61.99* (£5.58)

Opportunities in the US

"The vast number and variety of stakeholders currently preparing to make their mark on the US sports betting markets as the individual states start regulating is a testament to the expected size of the market, once fully regulated."

"In Better Collective, we have been preparing for entering the US market for quite some time... While we do not expect organic growth to do it alone, we believe that Better Collective has a unique offering in terms of technology and know-how in order to find attractive business in this new and potentially very big market."

JESPER SØGAARD,
CEO

*Correct as of
18.1.19

Key to the kingdom

Bernadette Kelly, director of SEO and content for digital marketing company ActiveWin, talks long-tail keywords with **iINTERGAMINGi Affiliates**

FOR the uninitiated, here's a quick précis: long-tail keywords are search terms consisting of three or more words, used to target a particular niche.

Generally, in terms of search traffic, around 60 per cent of demand is driven by less than one per cent of the most popular keywords.

That leaves another 40 per cent for the remaining 99 per cent – otherwise known as the long tail.

There is considerable power within the more specific phrases that visitors use when conducting searches and for affiliates, hitting particular sweet spots through effective management of long-tail keywords can have a major impact.

To dig down into how to best implement a long-tail keyword strategy, *iINTERGAMINGi Affiliates* discussed the issues with Bernadette Kelly, whose advice comes with a disclaimer: there is no side-stepping hard graft.



THE IMPORTANCE OF LONG-TAIL KEYWORDS FOR AFFILIATES

BK: Let's be realistic: it is very difficult for an affiliate, particularly a new affiliate, to rank well for generic industry search terms since other sites, operators, and game developers have been indexing for years.

The only chance for ranking well on gambling terms for a younger affiliate site is focusing on long-tail keywords. The perceived drawback is a lower search volume, but the relevance of matching on these terms can often lead to more conversions.

DISCOVERING YOUR AUDIENCE AND FINDING THE NICHE

Put simply, there are no shortcuts when it comes to SEO, so it is necessary to be ready to invest significant time and energy researching the market to carve out a niche for your site.

A good place to start is by checking what terms currently drive traffic to your site. If you see patterns in the types of keywords and phrases that players are using to find your site, this is the proverbial low-hanging fruit and should make up the basis for your SEO strategy.

Google's keyword planner can also offer up a few nuggets of wisdom. Tools like SEMRush are another great resource, but you must be willing to pay for their insight. Don't forget about social media either; see who follows you and determine if there is a consistent demographic that is drawn to your content.

THE VALUE OF LOW-COMPETITION KEYWORDS

As mentioned previously, what these words and phrases lack in volume can be made up for in conversions. Someone typing in the search

"Rainbow Riches slot machine" can have a multitude of reasons for searching. The intent for this search is unclear. Compare that to someone who types in "what is the best site to play Rainbow Riches on" and the top-ranked organic result belongs to the affiliate site Casino Papa.

We focused on the term "who has the best welcome offer for Rainbow Riches" for Bucky Bingo, and it ranks #1 organically.

These examples outrank PaddyPower, Sky Vegas and Mecca Bingo for these terms, which is very impressive. The caveat is that this result could easily change tomorrow – which is why daily diligence in SEO is required for maintaining those top spots.

CUTTING-EDGE TRENDS AND THE EMERGENCE OF VOICE SEARCH

Voice search is tipped to be the hottest channel in 2019, with the AI offered by Siri and Alexa making huge advances in the past 12 months. Many people within gambling dismiss the idea that players will use voice search; however, it wasn't long ago that people scoffed at the idea that consumers would access the Internet from their mobile phones.

If you can start to index for how people naturally speak to a voice AI-assisted search, you are setting yourself up well for future rankings. The beauty of voice search terms is it's relatively new, which means there is more of a level playing field for smaller and newer sites because no one has really monopolised all the long-tail terms – but that won't be the case for long.

TALKING CONVERSION

It's a little too early to tell what the average conversion rate is for long-tail terms, but it stands to reason that if your content matches the highest for relevance to a search that indicates a user is in "buying" mode, you have a better chance of converting than if they are in "research" mode.

What is important is satisfying the query by providing quality content in order to improve conversion.

HOW TO INTEGRATE LONG-TAIL KEYWORDS

The most obvious place to do this would be within the FAQ section of a site. If you don't have an FAQ page, make one. Otherwise, you are missing a golden opportunity to index for long-tail searches.

Consider your page titles and meta tags as well. Be patient and remember that search engines make their money through paid ads, and ranking well organically takes patience, precision, research, and lots of time. If you don't have the resources, outsource it to someone who does.



Lending a helping hand

Through its forums, the GPWA brings affiliate webmasters and affiliate managers together. Here, **Michael Corfman**, executive director of GPWA, shares another insightful exchange



IT'S a conundrum for all gaming affiliates, who reap a profit every time an anonymous player loses money: are we expected to help problem gamblers who visit our site, and if so, how?

That was the question posed by a concerned member in a recent thread at the GPWA forums. And the answer is quite complicated.

Some fellow members don't feel obligated to be concerned, citing that it's the casino or bookmaker's job to try to police problem gamblers. Others felt that they would help if they could, but explained it's nearly impossible to know the situation of the players that come to their site and end up

depositing and losing money online. And, of course, there were those who felt strongly that webmasters should and could provide steps to help players in need.

Excerpts of the thread can be found below. Check out the entire conversation at <http://gpwa.org/413> (note that posts reproduced here are edited for length and clarity).

Be sure to visit GPWA.org for more compelling forum posts, industry news and complete archives of our weekly newsletters and the *GPWA Times Magazine*.

THREAD TITLE: SHOULD WEBMASTERS HELP FIGHT GAMBLING ADDICTION?

#1 Cross (new member)

Are you as gambling website owners doing anything special to detect problem gamblers and to help these people, beside links to Gamblers Anonymous, etc?

These people are the dark side of the industry. I am interested more in ideas on how to help them, rather than general discussion whether it is "their fault" or "the industry's fault."

#2 Deano99 (public member)

Without trying to pass the buck, I think it's the responsibility of the bookies. I heard a sad story the other day about someone I know who gambled away €150k, which he had received as a work-related injury payout.

The bookies are quick to limit your account when you win too much, but I've never heard of them limiting accounts when you lose too much. There needs to be some legislation. These self-imposed limits that the bookies offer are insufficient.

Affiliates are mostly compliant when it comes to "Bet Responsibly" warnings, links to Gamble Aware, etc, which is as much as they can do at the point of entry.

#3 Triple7 (public member)

Those links are BS. It's like, "hey, let's post this link, then we do not have to care, because with this link we show we care."

I have no insights into who my traffic exactly is. GDPR rules. I see in the stats people playing, but have no clue who exactly they are. Some don't play too much, but who knows what they're doing at other brands without my tag. Some play a lot, but I've got no clue about their financial situation.

I think it's up to authorities to create a legal framework in which player protection has a place. It's up to brands to follow it, and it's up to authorities to fine or revoke a licence if somebody isn't doing that.

If I have evidence a brand is abusing problem players, I lower their rating. Also, if visitors comment or mail, I sometimes tell them to seek help instead of believing in another ridiculous theory.

I also try to provide correct information.

#4 vardan (private member)

Originally Posted by Triple7

Those links are BS. It's a bit like "Hey, let's post this link then we do not have to care, because with this link we show we care."

Exactly! Does anyone have stats on how many visitors read the terms placed on our websites before clicking on the links? The responsibility is on bookmakers. They must play fair, like Deano said. They don't limit accounts if the player loses big money – they encourage them play more and deposit more with new bonuses and promotions.

Even if we display all terms and conditions of the bonuses and mention responsible gambling 1,000 times, it will not enforce the gamblers to play more responsibly. The operators must have goodwill and some tools to protect and "control" them.

Instead, representatives of the operators, the affiliate programs, send us a ton of e-mails to display the terms of bonuses everywhere they appear to show that they are doing their job and avoid the responsibility. Of course, we must do our best too, but it is not correct to try to share the responsibility with us. I think many of them will use this situation for closing many "unnecessary" affiliate accounts.

#5 JamieG1981 (public member)

I'm not sure what we can do ourselves. We don't get any personal information on the customers you refer.

For the programmes where you can view individual player activity, if a player loses a large amount of money you have no idea if he has lost his life savings or is just a whale.

The bookies need to be responsible in protecting vulnerable players.

Personally, if I meet someone and they ask about what I do, I never encourage people to gamble. In fact, I do the opposite – I will tell them to stay away from it all.

#6 Sherlock (public member)

If the webmaster is not an idiot, he wants the rich, stupid and desperate gamblers to register and squeeze all the money out of them. Bookies want the same.

I see no reason to write an article in which most likely everybody will ignore, and if it is not being ignored, it will cost me big money on missed profit.

Weak people make me sick. And it is not just gamblers. It is also gambling affiliates who cannot handle their own guilt, so they need to pretend that they are helping people for which they provide the tools for destruction.

I understand that the states must behave schizophrenically and pretend that they are helping the weak, because only that way the weak do not revolt or change anything. I also understand that some people who want to be perceived as nice people have the messiah complex, so they want to "help" gamblers to get some points as good citizens.

#7 Sweetbet (private member)

As an affiliate, it's not my responsibility to take on the role of a concerned welfare worker who wants to find and save gambling addicts. Just like it's not the responsibility of the liquor store manager to try and help every alcoholic that walks into his shop. Besides, unless a person genuinely wants to help himself, then no one can help him.

#8 Triple7 (public member)

Originally Posted by vardan

"Exactly! Does anyone have any stats how many visitors read the terms placed on our websites before clicking on the links?"

I do not have those stats, but I guess that at best people are just scanning it quickly. I have a direct link to an exclusion form at one of my websites. This form is on certain pages that are about problem gambling or risky behaviour.

A total of 5.8 per cent of the visitors to those pages click on that link. I guess Gamble Aware links on random pages that are not linked to problem gambling would score way less than that.

“AS AN AFFILIATE, IT'S NOT MY RESPONSIBILITY TO TAKE ON THE ROLE OF A CONCERNED WELFARE WORKER WHO WANTS TO FIND AND SAVE GAMBLING ADDICTS”
Sweetbet

#9 MichaelBluejay (public member)

Many of the "not my problem" replies to this thread exemplify why I rarely rub shoulders with other affiliate webmasters, and don't participate much in forums like this one.

Cross, to answer your question:

(1) In three separate sections of every one of my pages, I have a small section on problem gambling, including a hotline number, a link to an online help page, and a link to some eye opening horror stories.

(2) I wrote an article exploring why people gamble, and why some gamble to excess. Excerpt: "For years it's been fashionable to blame addicts for their addiction. 'I can control myself,' the thinking goes, 'so why can't they?' Well, the difference is that the way some people's brains are simply wired make them extremely susceptible to addiction. The reason you're not an addict isn't because you're the paragon of self-control; you're not an addict because you got lucky biologically. Other people haven't been so lucky."

(3) I've called for specific reforms of casinos' predatory practices. This won't do much unless and until I have the funds and time to start a non-profit to lobby for such reforms... To my knowledge, no group is pushing for those kinds of reforms. I wrote to a professor who studies gambling addiction to ask if he knew of any, but didn't hear back.

#10 TheGooner (private member)

We have a responsible gambling page on site – and links to it from most pages. Other than that, we do not do anything else.

As an affiliate site, we collect no data on our players, no emails, no logins, so it's impossible to track one visit to the next.

As such, it's impossible to identify and locate individuals across multiple visits or identify a gambler of any sort.

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The recovery process

Oren Arzony, director at House Tech Ads, makes the case that an increasingly stringent regulatory system in the UK can help lay a platform on which operator-affiliate relationships can flourish once again



OVER the past year, igaming has certainly had its fair share of unwanted headlines, specifically when it comes to certain operator partnerships with affiliates.

Reined in by tighter channels of compliance, licensees are now responsible for the actions of any third party that they employ.

At House Tech Ads, we welcome all these changes – and the UK should be applauded, albeit somewhat belatedly, for setting a stronger tone which the rest of the world is encouraged to follow.

Put succinctly, operators needed to exercise much better control over their traffic, while affiliates now have to play their part and embrace all the compliance values of their operator partners. Ultimately, any affiliate's reputation is founded on trust.

So while certain affiliates might find following these tighter guiderails as an impediment to progress, we see this evolving landscape as a fresh opportunity for our trusted brands – a wide variety of gambling communities and portals, including over 150 websites and mobile apps from reliable industry brands as recognisable as Jackpots Finder, OnlineCasinoReports.com and GamblersPick.com – which we can leverage over 15 years of industry experience and expertise.

THE IMPACT OF GDPR

As trite as it may sound, opportunity and challenge really can be two sides of the same coin. So, as we've just intimated, it really speaks to the individuals concerned, as to how they interpret the demands of GDPR. We've seen that it's simply not enough to have the best intentions. At the end of the day, only incorporating the best practices allows you to deliver on those best intentions. So, to the extent that the aforementioned regulatory dials have been set correctly, I think we'll see the relationships between operators and affiliates recover and flourish. Indeed, there's a real incentive now for operators and their affiliate partners to function with confidence and mutual respect.

CLARITY FOR ALL

The trouble with a flurry of regulatory revisions is that it can sometimes lead to misaligned, even conflicting terms of engagement. Just look at the domain of data protection which provides an eloquent case in point.

Operators, of course, are bound to manage data under GDPR – a fiduciary duty which stems from their gaming licences. Affiliates, on the other hand, have to depend on clear consent.

Equally, operators must be mindful of fortified

AML measures, not to mention following best practices to protect their at-risk players with self-exclusion measures that work right across the gaming real estate. From red-flag payment processes to player-activity profiling, such steps are ideally taken in conjunction with affiliate partners in order to achieve the desired results (e.g. sharing a list of vulnerable or susceptible players with an affiliate pre-mailout).

However, without a direct legal mandate, affiliates aren't being allowed to fully participate from their side unless all terms are already defined in their own privacy policy. So while the rules of GDPR may ostensibly appear clear enough, some of the GDPR limits are actually limiting the huge net benefit that affiliates can bring to compliance.

FORMULATING A STRATEGY

No virtue-signalling intended, but if you can't provide the most secure and enjoyable experience for your customers, you should start looking for a new line of work. Accordingly, the only responsible approach was to fully embrace GDPR, or any new compliance regulations for that matter, and make the adjustments in order to protect our end users.

We recently launched our definitive online casino portal, GamblersPick, to serve as the go-to community resource for online casino players and brands alike. It's swiftly plugged a gap in the market for an affiliate site with a focus

on building a community of players, so we know all about the advantages of putting customers' needs first. Harnessing their combined igaming insights also speaks to our operator partners regarding successful acquisition and retention techniques.

AFFILIATE PROGRAMMES: WHAT LIES AHEAD?

As House Tech Ads sees it, the challenges are not specific to GDPR in the UK and the inherent power of the vertical remains undiminished. After all, affiliate acquisitions constituted a progressive area of activity for buyers throughout 2018. And these rates of acquisition show little sign of abating.

Granted, we know that some brands in the UK will naturally err on the side of caution with any problematic affiliates whose behaviour may increase the threat of fines. However, that doesn't mean that the programme should close down, only that those affiliates should be cut from the programme. That's just common sense.

On the other hand, affiliates which have aligned themselves properly with all the compliance obligations outlined by their operator partners will continue to enjoy a mutually beneficial relationship with improved transparency and confidence. To which end, in our personal experience, the commission structure has not been affected in any appreciable way.

Breach risk

GamblingCompliance editor **Joe Ewens** on the major challenges facing operators in the UK concerning compliance and affiliates

LATE last year, the UK Gambling Commission bestowed upon itself enhanced powers to punish those found in breach of guidelines laid down by itself, the Competitions and Markets Authority and the Advertising Standards Authority.

While it is yet to use these powers, industry followers will know that the UK regulator is not shy on enforcement and as third parties, affiliates often pose the greatest risk of a breach.

As we know from past commission rulings, it is ultimately the operator that will be held to account for any missteps by their affiliates.



FUTURE PROSPECTS

While we might not return to the halcyon days of gambling affiliates in the UK any time soon, there are signs that we are past the nadir.

Major firms that have previously abandoned their affiliate programmes continue to do more bespoke deals and the general environment around affiliates is less intense than it was 18 months ago.

Outside of the UK, while affiliates may be under pressure in Italy, Belgium and elsewhere there are more friendly markets.

Sweden may be one of them, with operators restricted only to account opening bonuses – the bread and butter of affiliate marketing.

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